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COMMITTEE'S COMMUNICATIONS

MEETING OF THE INTERNATIONAL COTTON COMMITTEE, MILAN, NOVEMBER 7, 1938

The meeting of the International Cotton Committee, which should have been held in Venice on September 30 and October 1 of this year, and which had to be postponed owing to the international situation has now been fixed for November 7 at Milan.

Many interesting items appear on the agenda, including the formulation of a new agreement in respect of Humidity in Egyptian Cotton. The Egyptian cotton exporters have now accepted in principle and with certain minor modifications, the suggested agreement put forward by the spinners at the meeting of the Joint Egyptian Cotton Committee in Berlin in July last. It is confidently expected that an agreement along these lines, with certain slight modifications, will be ratified. Any agreement reached will come into operation fourteen days after the termination of the Milan meeting scheduled for November 7 (i.e., on November 21, 1938), and is intended to replace the Humidity Agreement which has been in force since 1931. Full details of the new agreement will be forwarded to affiliated associations, associate members, and any other interested parties as soon as possible after the ratification of the agreement.

A full report of the proceedings of the Conference of the International Standards Association held in Berlin in June last, will be submitted to the Committee at this meeting, and any action deemed desirable will be taken in respect of the adoption or otherwise of testing methods and textile terms relating to the raw cotton, yarn and cloth trades.

Through the medium of the trade press, especially in the United States, attention has once more been focussed upon the use of cotton

baling material for covering cotton bales, the question being inseparably connected with that of the buying of cotton on a net weight basis. This matter will accordingly be further discussed by the Committee, who at a meeting held six years ago passed a resolution in favour of the adoption of cotton bagging and a net weight contract. The Committee will be asked to re-affirm the decision then taken, and thereby add its weight to the pressure which is being brought to bear upon the organisations concerned to bring about this reform.

Another important decision the Committee will have to make is the determination of the venue of the next International Cotton Congress to be held in 1940.

COMPLAINTS IN REGARD TO AMERICAN COTTON

It will be remembered that the first deliveries of the new crop of American cotton in September and October, 1937, showed an unusual amount of damp and gin-cut cotton. This was due to excessive rains and stormy weather just at the time that picking was started. This condition, together with the enormous crop of nearly 19,000,000 bales, was responsible for a considerable number of complaints of abnormal damp and rough ginning. Many samples and complaints were forwarded to Washington and appropriate publicity was given to these faults.

Very shortly, deliveries of the new 1938 crop will begin to arrive, and spinners are requested to make careful note of any unusual conditions which present themselves. Mr. Fred Taylor, representing the United States Department of Agriculture, has been authorised to remain in Europe for another season so that he can again follow up any complaints which may arise in new crop shipments.

It is very desirable that spinners should keep him informed of any complaints so that they can be followed up in a proper manner. His address is Room 7, Fourth Floor, Sunlight House, Manchester. Complaints sent to Mr. Taylor should, if possible, be accompanied by samples of from $\frac{1}{2}$ lb. to 1 lb., and be of such a character as to fully illustrate the nature of the complaints. They should include any American gin or compress tags, and information on the grade and staple, origin of cotton, i.e., Texas, Georgia, etc.



BELGIUM

The stagnation in the Belgian cotton industry indicated in our recent reports has persisted during the months of July, August and September.

Production per installed spindle has shown a reduction of about 20 per cent., in comparison with production during the same period of 1937.

Business is difficult to transact, and prices are very keen.

During the period under review, the market has been unfavourably influenced by the seasonal slack period, and by European political events. At the moment of writing, it is too early to foresee the effects upon the market of the evolution of the international political situation.

No changes in wages have occurred since our last report.

The original report in French runs as follows :—

Le marasme de l'industrie cotonnière, signalé dans nos rapports précédents, a persisté durant les mois de juillet, août et septembre.

La production par broche installée a marqué un recul d'environ 20% par rapport à la production des mêmes mois de 1937.

Les transactions restent difficiles et les prix sont fort discutés.

Pendant la période sous revue, le marché a été défavorablement influencé par le ralentissement saisonnier et par les événements européens. Au moment où nous écrivons ces lignes, il est trop tôt pour prévoir l'orientation qui sera donnée au marché à la suite de l'évolution de la politique internationale.

Il n'y a pas eu de modifications de salaires depuis l'envoi de notre dernier rapport.

(Association Belge des Filateurs de Coton)

CHINA

The 1937-38 cotton year (October-September) was drastically affected by the Sino-Japanese conflict. Military hostilities were conducted on a wide scale in North China and in the Shanghai area, and the Chinese ports were blockaded from the beginning of the crop year. A large 1937 cotton crop was produced, but the harvesting and marketing in many districts were retarded by military activities. Many cotton mills were damaged,

some totally destroyed, and others were forced to close. Transportation facilities were so badly disrupted that many mills were unable to market their textiles and buying power was materially reduced in most parts of the country.

Mill consumption during the 1937-38 crop year is expected to show a decline of fully 50 per cent. from that of the previous year. Many of the large Shanghai mills were damaged, some destroyed, and practically all were forced to close for several months. Less than 10 per cent. of the cotton mills in China, excluding Manchuria, have been able to operate uninterruptedly throughout the year. As a result of the greatly reduced activity of the mills, a shortage of yarn has arisen. Prices for yarn in recent months have been advancing steadily, and, with comparatively low prices for raw cotton, profits to cotton mills have been very large.

An increase of about 40 per cent. in activity of cotton mills during 1938-39 is expected because of the rehabilitation of Japanese mills at Shanghai and to some extent at Tsingtao, and the taking over by the Japanese of Chinese mills in occupied territory.

Shanghai mill activity improved during July and sales of cotton yarn increased. Prices for cotton yarn were at high levels because of nearly exhausted stocks, continued demand from South China, and speculative buying, according to local trade reports. Spinners' margins were reported to have continued high. Cotton consumption in China during July was placed at about 120,000 bales.

(U.S. Dept. of Agriculture)

ENGLAND

SPINNING SECTION

The past quarter has witnessed no improvement in the position so far as spinners are concerned. Producers in both the Egyptian and American sections are suffering from the lack of demand which has resulted in short-time working to such an extent that, generally speaking, mills are engaged at not more than 60 per cent. capacity. The uncertainty of the international situation led to the withholding of orders on the part of buyers, and this factor, coupled with the removal of the conditions of the price control of the medium American ring yarn agreement owing to its members being subjected to keen competition from spinners outside the agreement, created an unusually difficult situation.

It is, however, encouraging to report that a determined effort is to be made to secure support for a price agreement to cover all types of American ring yarns up to and including 46's counts, and also all types of American mule twist up to and including 46's counts.

The other Price Maintenance Agreements in operation in the spinning section are working satisfactorily and with the passing of the international

crisis, spinners are naturally looking forward to a broadening of demand and consequently more employment for their workpeople.

In regard to the Proposed Enabling Bill, the Government is at present engaged in drafting its contents for submission to the industry.

MANUFACTURING SECTION

There has been no improvement in the manufacturing section during the past quarter, and activity and prices continue to be highly unsatisfactory, the output being little more than half of capacity. The disturbed European political situation has seriously affected the confidence of buyers, who are reluctant to place contracts in view of the unsettled outlook.

FRANCE

Conditions in the French cotton industry have undergone no material change during the quarter under review, and if it can be stated that they are no worse than they were during the previous quarter, it can also be stated with equal emphasis that they are no better. Prices continue to show but little profit to the seller.

Taking into account the individual short-time operated by most firms and the stoppage of machinery completely idle, the degree of activity of the industry can be estimated at about 72 per cent. for the spinning section and 76 per cent. for the weaving section. It must also be borne in mind that there should be added to the stoppage represented by the above percentages the lack of production resulting from the granting of holidays with pay during the month of August, when the mills were closed for two weeks.

As far as wages are concerned a board of arbitration granted an increase of 3 per cent. to workers in the Nord textile district. An increase of from 3 to 5 per cent. according to categories, was also granted in the Normandy district at the commencement of the quarter.

— . . . —
The original French text runs as follows :—

La situation n'a subi aucune modification importante au cours du trimestre en revue et si elle ne présente pas d'aggravation par rapport au trimestre précédent, elle ne comporte pas non plus d'amélioration. Quant aux prix, ils continuent à être très peu rémunérateurs.

Compte tenu du short time individuel pratiqué par la plupart des firmes et du chômage représenté par l'outillage complètement arrêté, l'indice d'activité des usines est d'environ 72% pour la filature et 76% pour le tissage. D'autre part il y a lieu d'ajouter au chômage représenté par les pourcentages ci-dessus le manque de production résultant de l'application des congés payés généralement donnés au cours du mois d'août par fermeture des usines pendant deux semaines.

En ce qui concerne les salaires, une sentence arbitrale les a augmentés de 3% dans l'industrie textile du Nord. Une augmentation de l'ordre de grandeur de 3 à 5% suivant les catégories est également intervenue dans l'industrie textile normande au début du trimestre.

STATE OF TRADE REPORTS

IMPORTATIONS ET EXPORTATIONS
IMPORTS AND EXPORTS

					1938	
					1er trimestre <i>First Quarter</i>	2ème trimestre <i>Second Quarter</i>
					Quintaux	Métriques
					<i>(In metric quintals)</i>	
A—Importations : (<i>Imports</i>)						
1.	Fils de coton (<i>Cotton Yarn</i>)	..	..	..	1,478	1,444
2.	Tissus de coton (<i>Cotton Cloth</i>)	..	..	..	2,631	2,237
B—Exportations : (<i>Exports</i>)						
1.	Fils de coton : Exportations totales (<i>Cotton Yarn—Total Exports</i>)				21,423	20,405
	A destination de l'Algérie, Colonies et Pays de Protectorat .. (<i>Yarns exported to Algeria, Colonies and Protectorates</i>)				7,285	6,665
	Marchés étrangers (<i>Foreign Markets</i>)				14,138	13,740
2.	Tissus de coton : Exportations totales (<i>Cotton Cloth—Total Exports</i>)				105,289	104,895
	A destination de l'Algérie, Colonies et Pays de Protectorat .. (<i>Cloth exported to Algeria, Colonies and Protectorates</i>)				96,006	95,550
	Marchés étrangers (<i>Foreign Markets</i>)				9,283	9,345

(Syndicat Général de l'Industrie Cotonnière Française)

GERMANY

SPINNING SECTION

The state of trade in the spinning section of the German cotton industry has been well maintained during the third quarter of 1938. The degree of activity has remained at about the same level as that of the previous quarter; in some cases it even shows a slight increase.

Here follows the original text in German : —

Die Stetigkeit in der Geschäftslage der deutschen Baumwollspinnerei hat auch im 3. Vierteljahr 1938 angehalten. Der Beschäftigungsgrad der Betriebe blieb auf dem Stand des vorausgegangenen Vierteljahres, zum Teil hat er noch eine leichte Steigerung erfahren.

(Fachgruppe Baumwollspinnerei der Wirtschaftsgruppe Textilindustrie)

WEAVING SECTION

Business conditions during the third quarter of 1938 have remained approximately at the same level as that reached during the second quarter of the same year. Furthermore, the active taking-up of running contracts has not been changed.

The degree of occupation in the weaving section during the third quarter, as compared with the second quarter, shows a slight increase.

The following is the original report in German :—

Der Eingang an Aufträgen hat sich im 3. Vierteljahr 1938 auf ungefähr gleicher Höhe wie im 2. Quartal 1938 gehalten. Auch der lebhafte Abruf auf laufende Kontrakte hat sich nicht geändert. Der Beschäftigungsgrad der Webstühle hat im 3. Vierteljahr gegenüber dem 2. Quartal eine kleine Steigerung erfahren.

(Süddeutsche Bezirksgruppe der Fachuntergruppe Rohweberei der Fachgruppe Baumwollweberei)

HOLLAND

SPINNING SECTION

The demand for yarns has somewhat increased since the middle of September and most spinners are fairly well occupied. It is, of course, possible that the improvement in demand is partly the result of the political disturbances and the fear of manufacturers of being without yarns in case of difficulties. This may have had some effect on the demand for stocks but it seems also that there is more real business. Prices are still low and on the whole spinners' margins are not remunerative.

MANUFACTURING SECTION

The autumn demand for the home trade is not unsatisfactory, and on the whole manufacturers are receiving more orders than during the last few months. There is, however, still very fierce competition but sales are larger than they have been.

The demand for export has been very quiet, chiefly because nobody cared to take any risks. It may be expected that with the improvement in international politics confidence will be restored, which may result in an improvement in trade, as for many markets, stocks seem to be low and purchases should be necessary. There is a somewhat better feeling in manufacturers' centres and on the whole conditions seem more promising than three months ago.

It is difficult to give percentages of the degree of occupation in the industry at the moment. There are some Government publications dealing with this matter, but they are always a few months behindhand with their information which is, of course, inevitable. According to these figures the occupation was as follows in percentages :—

	Cotton spinning	Cotton manufacturing
	1929 100	100
	1936 91	69
	1937 111	90
1st quarter	1938 107	84
2nd quarter	1938 102	73

There has been no change in wages since our last report.

HUNGARY

The condition of the cotton spinning and weaving industry in Hungary has remained, in general, unchanged during the period under review.

Some import and export figures for the cotton industry for the first half of 1938 follow :—

JANUARY—JUNE, 1938			
			Imports
			Quintals
Raw cotton			125,400
Cotton yarns			3,990
Cotton piecegoods			2,420
			Exports
			Quintals
			—
			19
			5,874

Printed cotton goods formed the bulk of exported cotton piecegoods.

ITALY

In the course of negotiations between the employers' and workers' organisations for the renewal of the collective agreement governing working conditions in the Italian cotton textile industry, it has been agreed that the wages of workers in the industry, numbering about 200,000, shall be increased by 10 per cent., the increase to take effect as from May 9 last.

(Ministry of Labour Gazette)

JAPAN

The remarkable expansion of the Japanese cotton-textile industry, which continued even through the world depression, was halted abruptly during the 1937-38 crop year (September-August). Raw cotton imports and consumption were considerably reduced as a result of the rigid Government import control exercised throughout the year, together with regulations since January restricting domestic consumption. Cloth exports were also materially reduced as a result of the control measures, which caused an advance in prices. Reduction in imports of raw cotton were greater than the decrease in mill consumption, so that stocks of raw cotton at the close of the season were very small and much below the large stocks of a year earlier. Domestic stocks of piecegoods and yarn, however, were at an exceptionally high level and much above the large stocks of a year earlier.

(U.S. Dept. of Agriculture)

POLAND

The Zrzeszenie Producentow Przedzy Bawelnianej w Polsce report the hours worked by the cotton industry in Poland during the third quarter of 1938 are in accordance with the following tabulation :—

DEGREE OF OCCUPATION OF COTTON MILLS

	Aver.			
13th June—10th July, 1938	40.01 hrs.	=	83.35%	of full time production (48 hrs.)
11th July—17th Aug., 1938	43.14 "	=	89.87%	" " "
8th Aug.—4th Sept., 1938	47.73 "	=	99.43%	" " "
5th Sept.—2nd Oct., 1938	50.88 "	=	106.00%	" " "

Exports of cotton piecegoods and made-up clothing are given below for the four months ending September.

EXPORTS :					Piecegoods		Made-up
					value	weight	Clothing
					zl.	kg.	kg.
June,	1938	..	..	..	134,451	20,212	112,628
July,	"	..	..	..	598,262	92,983	72,274
August,	"	..	..	..	656,821	97,236	26,301
September,	"	..	..	..	540,977	85,171	19,982

PORTUGAL

The unusual activity in cotton manufacturing which marked the last half of 1937 continued well into the present year. Despite decreased exports to the Portuguese colonies, demand for piecegoods has been satisfactory on the whole. Spinners, however, have suffered from loss of business in Spain and have been working short hours since the middle of April. Weaving mills worked full time until June but many of the latter were on part time in July and some had temporarily shut down for lack of orders.

Exports of cotton goods from January to April, 1938, totalled 917 metric tons, of which 757 went to the colonies and 157 to Spain. These figures are smaller than those for the corresponding four months of 1937 (a total of 1,240 tons, of which 1,209 went to Portuguese colonies and 31 to Spain).

A considerable portion of the cotton yarn output of Portugal was exported to Spain. While the trade with Spain declined abruptly during April last (owing to exchange difficulties), local opinion seems to be that as long as Catalonia cannot supply cotton yarn to other parts of Spain, the latter will have to import the yarn. Portuguese spinners hope that it will be possible to make some arrangements for payment.

(*U.S. Cotton Trade Journal*)

SWEDEN

Degree of Occupation.—There has been a decided slackening off in the trade and the order-volume has decreased to a considerable extent. This is probably due to an overstocking during the first part of the year but can also to a certain degree depend on the last month's political happenings.

Alterations in Wages.—The present agreement between the employers' and the workers' associations is valid only until the end of this year. Negotiations have been carried on, however, and have resulted in a new agreement, valid until the end of 1939. This new agreement involves a slight rise in regard to the rates per hour and also in regard to certain piece rates. In general, however, the new agreement corresponds with the old one.

(*Svenska Bomullsfabrikantföreningen*)

SWITZERLAND

It was only to be expected that the international European political crisis should seriously effect business conditions during the third quarter of 1938. The home market was revived by a somewhat more active demand for articles of daily use, the trade endeavoured to replenish

obvious deficiencies in stocks especially in regard to coloured goods. In general only specialities in yarns, doubled yarns and grey goods benefited from this increased demand. The usual seasonal activity in the fine section was not quite as prolonged as usual. Assuming the degree of activity in the spinning section to have been approximately 75 per cent. of normal capacity, the doubling was under 65 per cent. and the different weaving sections varied between 65 and 85 per cent.

In general during the last few weeks of the period under review there was evidence of an improved sentiment.

Wages have remained unchanged.

The following is the original report in German :—

Es konnte nicht ausbleiben, dass die aussenpolitischen Vorgänge in Europa im III. Quartal 1938 den Geschäftsgang mit beeinflussten. Am Inlandmarkt zeigte sich etwas regere Nachfrage nach Artikeln des täglichen Bedarfes, offenbar bemühte sich der Handel, vorhandene Lücken in seinen Lagern, namentlich mit Bezug auf bunte Artikel, aufzufüllen. Im übrigen erfreuten sich nur einige wenige Spezialartikel in Garnen, Zwirnen und Rohgeweben vermehrter Beachtung. In der feinen Sektion blieb die übliche Saisonbelegung nicht ganz aus, liess aber noch viel zu wünschen übrig. Wenn die Produktion in der Spinnerei auf durchschnittlich ca. 75% normalen Standes geschätzt werden darf, so blieb sie in der Zwirnerei unter 65%, in den verschiedenen Webergruppen variierte sie zwischen ca. 65 und 85%. Allgemein zeichnete sich für die letzten Wochen des Berichtsquartals eine etwas freundlichere Marktstimmung ab. Die Löhne sind stabil geblieben.

(Schweizerischer Spinner-Zwirner und Weber-Verein)

YUGO-SLAVIA

As everywhere else consumption has also declined in Yugo-Slavia owing to the large supply of raw cotton and the consequent unremitting sagging of prices which, combined with the uncertain political and economic situation of the world, removed all confidence from the buyers although the peasant consumers are well supplied with money owing to the good prices received for their last few years' crops. Mills are producing much more than can be absorbed under present conditions and yarn stocks especially are therefore already excessive. Only a change in world conditions can produce a better outlook for the future.

Regarding the degree of occupation in the cotton spinning industry it should be pointed out that, on an average, double shift working continued during the period in question, although it was no longer so accentuated as before.

There have been no wage alterations for about two years.

Cotton yarns spun here are all consumed in the country and not exported, and Yugo-Slavia has even to import yarns to a greater value than the raw cotton she buys.

(Drustvo Bombaznih Predilnic Kraljevine Jugoslavije)



ARGENTINA

THIRD COTTON CROP ESTIMATE 1937-38

It is now estimated by the National Cotton Board that the production of cotton-fibre from the 1937-38 crop in Argentina will be only 45,000 metric tons, compared with 53,800 tons estimated by the Ministry of Agriculture in July last and with 72,000 tons in the first official estimate issued on March 8. It is understood that the latest reduction is attributed to the damage caused by heavy frosts, whereas earlier losses were due to excessive rains, unseasonable cold weather, and locusts. The actual output of cotton in the 1936-37 season was 31,170 tons, while the peak figure of Argentine production was 80,957 tons reached in 1935-36.

The Argentine Ministry of Agriculture has made arrangements with the Argentine National Bank whereby the branch offices of the latter will grant special loans to cotton farmers in the territories of Chaco and Formosa.

This measure is being taken due to the fact that the cotton farmers in some sections of Argentina have had unfavourable crops during the past two summers.
(U.S. Dept. of Commerce)

According to the Bank of London and South America, the prospects for the future expansion of the cotton growing industry are discussed in the annual report of the *Junta Nacional del Algodon* covering the year 1937, which has recently been submitted to the Ministry of Agriculture. It is stated that, once the area sown in Argentina reaches an extent of some 500,000 to 600,000 hectares, further progress will be very slow, due particularly to a shortage of labour. Mechanical picking had been successfully used at one of the Board's experimental stations, and it is opined that the mechanisation of the harvest work would in no way create a grave social problem, but would, in fact, be a remedy for the shortage of labour, since it would facilitate the extension of the cotton growing zone and permit the rapid colonisation of areas where the only industry at present economically feasible is cattle raising. The report of the *Junta Nacional del Algodon* also states that the mechanisation would render the Republic in as favourable a position for cotton as it now occupies in regard to its wheat.

A Bill has been submitted to Congress seeking to give definite legal status to the *Junta Nacional del Algodon*, which was originally created in

1935 ; the objects ascribed to that Board would include the introduction of a warrant system, the establishment of official standards, elimination of varieties giving low yields, and the exercise of an official control over quotations in the various markets. The Bill also fixes a scale of wages for workers both on the plantations and in the factories. The financing of the various schemes embodied in the Bill would be effected partly by the imposition of a tax of up to 2½ centavos per kilo upon all cotton fibre produced in Argentina.

BELGIAN CONGO

The following has been extracted from the " Report on Economic and Commercial Conditions in the Belgian Congo and Ruanda-Urundi," prepared by the former British Consul-General at Leopoldville. The Report has been printed and published for the Department of Overseas Trade by H.M. Stationery Office, London. Price 1s.

The development of cotton plantations in the eastern sectors of the Congo has been so successful as to present almost the features of a phenomenon. The first cotton crop in 1915 yielded twenty tons of raw cotton, and the annual crop has risen steadily to 43,591 tons in 1931. The following year registered a set-back to a yield of 26,013 tons, but the intensive propaganda measures of the Government, efficient cotton seed selection and improvements in technique have now placed this produce well on its feet. Production has increased to the high peak of 110,250 tons in 1937 (the official figure for 1936 is 89,574 tons of raw cotton).

At the time of the 1932 report 148,657 hectares of land were under cotton. In 1937 the area is more than doubled, with an overall average yield of 294 kilograms per hectare. In the districts the crop varied from a minimum of 129 kilograms per hectare in the Lac Leopold II area, to 850 kilograms in the Kabinda Territory, where the soil is exceptionally rich.

BRAZIL

The quantity of cotton of the 1938 Paulista crop classified by the local Produce Exchange up to September 15 was 240,054 metric tons, compared with 187,293 tons of the previous crop up to the same date last year. The official estimate of 250,000 tons for the current crop may, therefore, be exceeded. This year's crop also shows a larger proportion of the finer grades, about 68 per cent. of the quantity already classified having been discriminated as type 5 (basic) or better, compared with 49 per cent. last season.

(Bank of London and South America Ltd.)

BRITISH WEST INDIES

Total production figures for those Islands which have already completed their crop in the present year and estimates of production in Montserrat and St. Kitts where the crop is not yet completed are given in the following table :—

Island	Year	Production lb. lint
Anguilla	1937-38	15,000
Antigua	1937-38	175,000
Barbados	1937-38	Nil.
Nevis	1937-38	375,000
St. Vincent	1937-38	692,000
Virgin Islands	1937-38	5,800
Montserrat	1938	400,000
St. Kitts	1938	200,000

In Montserrat the planting season of 1938 began at the end of January and was completed on April 16. Germination was excellent but the very dry condition which were experienced from February to May seriously affected the development of the crop. With the onset of rains in June plants which had already formed and matured a small crop of bolls burst into renewed or secondary growth. A moderate late crop is expected from the secondary growth. Owing to the long and severe dry season in St. Kitts the bulk of the crop will also be late this year.

(Tropical Agriculture)

CHINA

The 1938 cotton crop in China, including Manchuria, is estimated at 2,200,000 bales of 478 lb. from an acreage at least 40 per cent. smaller than that of last year. Plantings have shown sharp decreases, principally because of difficulties in disposing of last year's crop at favourable prices and the desire for producing food crops. A reduction in cotton acreage has taken place in all Provinces of China, but the greatest decrease is in North China. Weather conditions for the new crop year were sufficiently favourable in most areas during the spring and the crop on the reduced acreage got off to a good start. Heavy rains, however, during the middle of the summer damaged the crop in both North and Central China.

(Foreign Crops and Markets)

A NINE-YEAR COTTON PLAN FOR NORTH CHINA

A nine-year plan for the cultivation of raw cotton in North China, but which still has to be considered by a group of Japanese and Chinese experts, envisages a gradual increase in cotton production from this year's 252,000 tons (or 1,412,000 bales of 400 lbs. each) to 600,000 tons (or 3,360,000 bales) by 1946; of the latter about 460,000 tons (or 2,576,000 bales) would be cotton grown from American seed.

(Financial News, Bombay)

Condition of the new crop is said to have improved during July and it is now estimated that the yield per acre may be slightly higher than in 1936-37. It is also estimated that cotton consumption in China for the season closing September 30, 1938, may total about 1,250,000 bales and that exports may reach 425,000 bales. Owing to the dislocation of the cotton mill industry, consumption of cotton for household spinning and weaving is expected to be much higher than usual and may approximate 1,200,000 bales. While no statistics are available as to the quantity of cotton destroyed by hostilities, local estimates place it at roughly 100,000 bales.

(Textile Raw Materials)

FRENCH INDO-CHINA

Cotton imports in 1937 amounted to 85,681 metric quintals compared with 79,345 in 1936. The main sources of supply are India, the United States, Japan, and China. Imports of seed cotton are negligible. Exports of seed cotton (unginned) in 1937 totalled 7,556 metric quintals, compared with 2,737 in 1936. Most of the seed cotton goes to Japan. Exports of lint cotton in 1937 totalled 1,321 quintals, compared with 986 in 1936. China and Hong Kong are the principal points of destination for lint cotton.

(Textile Raw Materials)

INDO-CHINA

The crop harvested in North Annam was below average owing to drought in spring and heavy late rains that made the drying of the bolls difficult. In South Annam the yield was poor, less than half the normal yield, owing to rain having caused shedding of the bolls. In the far south the sprouting of seedlings was good and even at the end of June.

(International Institute of Agriculture)

IRAQ

Cotton crop of 1938: From August 1937 to the end of April 1938, the quantity of cotton baled at the two ginneries amounted to 19,435 bales having a net weight of 8,128,000 pounds, according to the Baghdad Chamber of Commerce.

(Textile Raw Materials)

MANCHURIA

The 1938 cotton crop in Manchuria has recently been forecast at 86,000 bales of 478 lb. each, a slight decrease compared with last year's crop. The Government of Manchuria had planned to increase the crop to 123,000 bales this year by means of increased acreage and improved seed, but heavy rains damaged the crop and necessitated replanting in some districts. In spite of considerable planning and experimental work since 1933, the Manchurian cotton harvest has increased to only a small extent. The crop at the present time furnishes about 20 per cent. of the total requirements for cotton and cotton textiles in this area.

MANCHURIA: Production, Imports, Exports, and Mill Consumption of Raw Cotton, 1933-34 to 1938-39 (In Bales of 478 lbs.).

Crop Year	Production	Imports	Exports	Mill Consumption
Oct.-Sept.	Bales	Bales	Bales	Bales
1933-34 ..	72,085	73,076	21	104,000
1934-35 ..	105,267	47,740	4,225	137,000
1935-36 ..	48,046	98,392	4	134,500
1936-37 ..	73,884	159,663	688	*145,750
1937-38 ..	90,628	*108,000	*257	*148,000
1938-39 ...	†86,000	—	—	—

Production estimates of the Division of Agriculture, Hsinking, Manchuria; imports and exports from "Monthly Returns of the Foreign Trade of Manchoukuo"; mill consumption from trade sources.

* Total estimated from incomplete returns.

† Forecast by Shanghai office, U.S. Bureau of Agricultural Economics.

The six cotton mills located in Manchuria have increased consumption during recent years, so that raw cotton imports are now larger than they were five years ago. Imports for the 1937-38 crop year, which were estimated at 108,000 bales, are below those of the previous season, partially as a result of import restrictions.

(Foreign Crops and Markets)

MEXICO

According to advices received from Mexico, a processing tax on cotton is to be levied. The tax is to apply on cotton produced after June 30, 1938, as well as on old crop cotton delivered to cotton mills after June 30, 1938. The rate of the tax is seven pesos (1 peso=2.010 U.S. \$) per quintal of about 101 lbs. each. Out of the funds collected from this tax, the Government will grant the producers of cotton, as well as cotton manufacturers, the necessary subsidies, the declared purpose of the tax being to stabilise the market, compensating cotton producers in times of low prices and cotton manufacturers in times of high prices.

(Financial News, Bombay)

PERU

Cotton exports from Peru during the first half of 1938 totalled 16,890 metric tons, compared with 29,780 for January-June 1937. The decline, 12,890 tons, is attributed by local authorities to the reduced demand in world markets and to the fact that the current season is about one month late.

Of the total cotton exports for the 1938 half-year, 15,529 tons consisted of the Tanguis variety, compared with 26,443 in the first six months of 1937. Smaller shipments were recorded for all important destinations in the 1938 half-year, as follows: United Kingdom 8,320 tons, against 14,887 for the corresponding period of 1937; Germany 5,715 (9,357); Belgium 871 (1,419); Japan 222 (1,315); France 392 (842); and the Netherlands 196 (930 tons).

(Textile Raw Materials)

The June 1938 number of *Foreign Agriculture* issued recently by the U.S. Department of Agriculture contains the following interesting information regarding the methods adopted by Peru for financing her cotton crop and her assessment of a special cotton export tax:—
“From 25 to 50 per cent. of the Peruvian cotton crop is usually sold before it is ready for picking. Prices are based on samples of cotton produced during the previous season on the same farm, and are subsequently adjusted if the quality of the new crop differs. Loans are advanced by banks, cotton buyers, and financing institutions, up to 40 or 50 per cent. of the estimated value of the cotton to be sold, at interest rates ranging from 6 to 10 per cent. Agricultural banks finance the farmer without requiring the immediate sale of his cotton, but they maintain a more or less strict jurisdiction over the marketing of it. Legislative

provision is made for assessment of a special export tax on cotton, which, however, is not operative at the present time. The tax is based on the Liverpool price of 'Good fair' Tanguis cotton and amounts to 10 per cent. of the proceeds of cotton exports after the cost of transportation to Liverpool, and the cost of production as estimated by the Government have been subtracted. Thus when prices are below the officially estimated cost of production plus freight, as at present, no export tax is assessed. The officially estimated cost of production is now equivalent to about 10 cents per pound, and of transportation, 3 cents per pound."

PHILIPPINE ISLANDS

Cotton production in 1936-37 is estimated to have amounted to about 376,000 kilograms of seed cotton from 958 hectares, compared with 547,000 kilograms from 2,066 hectares in 1935-36, according to official statistics. (Kilogram=2.2046 pounds; hectare--2.471 acres.)

(Textile Raw Materials)

PORTUGUESE AFRICA

Cotton production in Angola during 1937 is estimated at about 3,000 metric tons, compared with 2,227 in 1936, according to official figures. Local authorities estimate that the area planted to cotton in 1938 may reach 40,000 hectares (of 2.471 acres each), compared with 32,000 in 1937 and 27,000 hectares in 1936. No official estimates of cotton acreage are available.

With the promulgation of two decrees on May 25, 1938, the Government has taken further steps to promote the growing of cotton in the Portuguese colonies.

One decree establishes a minimum price for colonial cotton imported into continental Portugal of 7.50 escudos per kilogram for first quality and 6.80 escudos per kilogram for second quality. Should the landed cost of foreign cotton be lower than those prices, the difference is to be refunded to purchasers of colonial cotton by the Committee for the Regulation of the Cotton Trade.

To provide funds for the payment of this differential, the decree establishes a tax of 0.50 escudo per kilogram on all foreign cotton imported into Portugal.

The other decree appears to have been promulgated in anticipation of an exportable surplus of colonial cotton, and provides for the establishment of a Board of Colonial Cotton Exporters (Junta de Exportacao do Algodao Colonial), with its head office in Lisbon and representatives in the cotton-producing colonies. All exporters of colonial cotton, including those exporting to the home country, are required to register with the Board within a period of 120 days, after which period only registered firms will be permitted to engage in the cotton export trade.

(Textile Raw Materials)

ROUMANIA

At the recent meeting of the *Oficiul National al Textilelor* in Bucharest it was stated that this year's raw cotton crop was a record one, and satisfactory both from the point of view of quality and quantity. The area cultivated was 6,000 hectares as compared with 1,800 hectares in the previous year. The cotton spinning mills are required to take over the ginned cotton at from 72 to 86 lei per kg. for third to first quality respectively. Now that the initial aloofness of the peasants has been overcome, it is proposed to increase the area cultivated from 6,000 to 30,000 hectares, so that, on the basis of 200 kgs. per hectare, the 1939 production will amount to about 6,000 tons. *(Textile Weekly, Manchester)*

RUANDA-URUNDI

Starting in 1927, about 1,900 hectares of land were already under cultivation by 1932, yielding 856 tons of raw cotton.* By 1936 the area had increased to 3,300 hectares with a crop of 2,010 tons. The average yield per hectare was 608 kilograms, as compared with 450 kilograms in 1932.

There were at the beginning of 1937 some eleven thousand individual native planters growing, on an average, 182 kilograms of cotton, which brought in the previous year over 145 francs a head, plus bonuses of five grammes of salt for each well-cleaned kilo of cotton and encouragement gifts of machetes and hoes.

(Extracted from the Department of Overseas Trade Report on Economic and Commercial Conditions in the Belgian Congo and Ruanda-Urundi)

SIAM

Exports of lint cotton for the fiscal year ended March 31, 1938, totalled 346,000 kilograms, of which 284,000 went to Germany, 50,000 to Japan, and 12,000 to Hong Kong. Exports of seed cotton for the same twelve months were 513,000 kilograms, of which 508,000 were shipped to Japan. Total shipments of cotton, in terms of lint cotton, approximated 496,000 kilograms or 2,180 equivalent 500-lb. bales. Preliminary estimates placed cotton production in Siam for the 1937-38 season at about 8,000 bales. *(Textile Raw Materials)*

SPAIN

According to a recent issue of the *Manchester Guardian Commercial* "The Sindicato Italo-Spagnolo has been formed in Rome for the promotion of Italian interests in the economic exploitation of Spain, particularly by encouraging raw material production in Spain. Among other things the Franco regime has started extensive cotton production. Every farmer who is willing to plant cotton is supplied with the necessary seed and other requirements and is given an advance of 100 pesetas per hectare planted, which is recovered out of the payment for the crop. The

* Presumably seed cotton.

whole of the cotton production is bought by a Government department which uses revenues arising from an import levy of 15 cents per kilogram on foreign yarns. Important spinning mills have been erected at Seville, Granada, and Valladolid and have started production.

UGANDA

A report recently issued by the Department of Agriculture of Uganda, gave the following summary of estimated cotton acreages for the various provinces. The report related to the month of August, 1938.

Province		July	August	Total to end Aug.,		Total 1937 Acreage
				1938	1937	
Eastern	.. ..	359,148	192,858	552,006	642,320	671,195
Buganda	.. ..	387,194	226,412	613,606	803,895	878,674
Northern	.. ..	131,174	48,022	179,196	192,606	194,379
Western	.. ..	4,488	3,719	8,207	14,309	14,909
Totals	.. ..	882,004	471,011	1,353,015	1,653,130	1,759,157

The above acreages are in many instances based on last season's mean plot size and are therefore subject to revision.

In view of the unfavourable weather conditions which delayed planting earlier in the season, the present acreage shows that satisfactory progress has been made. Although the total acreage at the end of August was 18 per cent. less than at the same time last year it compared very favourably with the 1936-37 season.

COTTON CULTIVATION IN IRAN

[From an article "Die Landwirtschaftliche Produktion Irans" by Bruno Laupert, in *Der Tropenpflanzer*, Vol. 41, No. 2, February, 1938 (page 60), (translated by Dr. W. Burns, Agricultural Expert, Imperial Council of Agricultural Research). The English translation was published in a recent issue of *Agriculture and Livestock in India*.]

Production statistics prepared by the Agricultural Department for the Iranian years 1310 to 1313 (1931 to 1934) are available. The occurrence of errors in the first year of such statistics both in yields and in areas is understandable. The hectare is not yet standardised in all parts of the country. The old unit of surface measurement was the kharwar, but the kharwar was and is a measure of weight also. As a measure of surface it denotes the area on which a kharwar of wheat or barley is used for sowing. One kharwar=100 batman, one batman=about three kg. (exactly 2,970 grms.). Therefore a kharwar is about 300 kg. (exactly 297 kg.). Since 1934 the metric system has been generally introduced into Iran; also the weights gramme, kilogramme, tonne (metric ton)—thousand kilogrammes. Recent statistics from the Iranian year 1313 (*i.e.*, A.D. 1934) are recorded in the new metric system, *i.e.*, in metric tons, kilogrammes and hectares.

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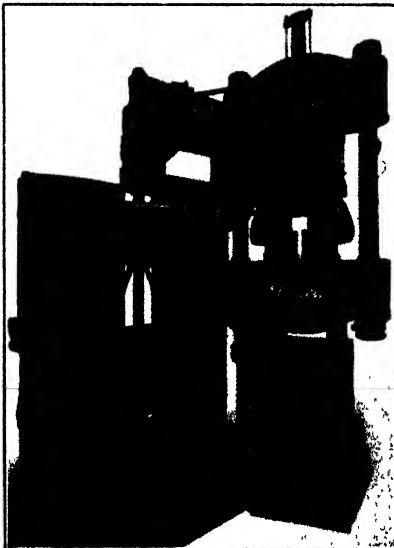
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These last figures of the year 1313 can therefore be taken as fairly reliable. The production of cotton was as follows :—

	1310 (1931)	TONS (Metric)		1313 (1934)
		1311 (1932)	1312 (1933)	
Cotton	25,916	53,257	52,884	92,588

A comparison of the present production figures with those of export in the same years show the following :—

	1310-11 (1931-32)	1311-12 (1932-33)	TONS (Metric)		1314-15 (1935-36)
			1312-13 (1933-34)	1313-14 (1934-35)	
Cotton ..	29,600	14,300	26,360	27,823	16,745

Cotton production figures give the seed cotton, export figures only the lint : the relationship of lint to seed cotton weight is about 1 : 2. There seem to be several errors in these statistics.

COTTON

The area cultivated has increased markedly from 53,000 hectares in 1932 up to nearly 100,000 hectares in 1934, and in 1937 reached 200,000 hectares. The old main centres of production, viz., the centre, the north, and the east, have very considerably increased their areas, and cotton cultivation has also spread into other parts of Iran. In 1934 the production statistics give for the first time separate figures for American and Iranian type cottons, viz. :—

American—63,269 hectares producing 57,940 tons of seed cotton.

Iranian—33,068 hectares producing 34,648 tons of seed cotton.

The export figures for 1934-35 were :—

4,000 tons Filestani priced at 4·98 Rial* per kilogramme.

11,600 tons American priced at 3·90 Rial per kilogramme.

11,000 tons Iranian priced at 2·75 Rial per kilogramme.

In the year 1935-35 exports were :—

5,000 tons Filestani priced at 4·3 Rial per kilogramme.

6,400 tons American priced at 4·0 Rial per kilogramme.

5,300 tons Iranian priced at 3·6 Rial per kilogramme.

Filestani can be classed among the American types (long-staple). It is derived from a cross between Egyptian and American cottons made by the owner Hakimy on the Filestani estate and is about twelve years old. Every year it covers an increased area.

Under the head Iranian is to be understood a form of *G. herbaceum*, which has been in the country for many years and whose boll does not open at the time of ripening and therefore requires only to be pulled off. At the same time the fibres are shorter and the price therefore lower. A comparison of the figures of the two areas for 1934 would seem to show that the Iranian variety gives repeatedly better comparison; however, we should consider the areas where at least a thousand hectares of the one or the other sort is cultivated. The following are the figures for the three main such areas :—

* Rial = roughly 3d.

<i>Centre</i>					
American	..	13,880 hectares	=	14,771 tons	= 1065 kg. per hectare.
Iranian	..	1,400 "	=	1,505 "	= 1075 Do.
<i>North</i>					
American	..	27,700 "	=	22,370 "	= 807 Do.
Iranian	..	6,000 "	=	4,050 "	= 675 Do.
<i>East</i>					
American	..	10,204 "	=	11,654 "	= 1142 Do.
Iranian	..	10,483 "	=	10,956 "	= 1045 Do.
Total average of the three areas					
American	..	51,784 hectares	=	48,795 "	= 942 Do.
Iranian	..	17,883 "	=	16,511 "	= 923 Do.

The American types show a somewhat better yield per hectare. We can roughly take an average of 1,000 kg. per hectare as the yield of either, about 300 kg. being lint and 700 kg. seed. However, different prices are paid for the three kinds, both for export and in the inland market. We shall not take the very widely varying prices paid for export in 1934-35, but content ourselves with the figures paid in 1935-36. These were Iranian 3.60 Rial for kg. lint and American 4.15 Rial.

The money value of the cotton produced per acre is as follows :—

Iranian : 300 kg. at 3.60 Rial per kg. = 1,080 Rial per hectare.

American 300 kg. at 4.15 = 1,245 Rial per hectare.

Similar differences appear if one compares the market prices at Teheran for seed cotton. In spring of 1937 these were as follows :—

Filestani : 1.17 Rial per kg. = 1,170 Rial per hectare.

American : 0.97 Rial per kg. = 970 Rial per hectare.

Iranian : 0.70 Rial per kg. = 700 Rial per hectare.

The management of cotton production including cultivation, working up of the harvested material, distribution and export lies in the hands of a monopolistic company formed in August, 1935. Cotton production in Iran has greatly increased due to the activities of this company. In the year 1937 it was expected that an area of 200,000 hectares would be cultivated.

Domestic (Iranian) requirements in the year 1312 (1933) were about 8,000 tons and have slowly risen. They were estimated at 12,000 tons in the year 1315 (1936) and about 14,000 tons for the year 1316 (1937). The home requirements ought to further increase when the spinning mills, now in course of erection, start work. The following table shows the main customers for Iranian cotton in the last five years :—

	1310-11 (1931-32)	1311-12 (1932-33)	1312-13 (1933-34)	1313-14 (1934-35)	1314-15 (1935-36)
	Tons	Tons	Tons	Tons	Tons
Russia	28,160	9,490	9,840	19,820	13,990
Germany	—	2,230	10,330	3,650	2,040
Japan	—	34	3,870	1,220	19
British India	1,450	2,510	1,810	1,230	630

The total export for the last five years is 112,000 tons made up as follows :—

	Tons
Russia	81,300
Germany	18,250
Japan	5,143
British India	7,630

Of the 8,600 tons of cotton exported in the year ending February 21, 1937, over 90 per cent. has gone to Russia. According to the Customs report the prices move between 4.25 Rial to 5.30 Rial per kg. The

monthly Customs bulletin does not however show the kinds of cotton (this is only done at the end of the year), so that the differences in price are understandable. On the other hand, for July-August, 1936, the following prices were noted for lint of the following qualities in the market of Teheran :—

Filetani	5.50 Rial per kg.
American	4.67 „
Iranian	5.67 „

Cotton prices in the interior market are higher than the world prices obtained for export cotton.

FUTURE DEVELOPMENTS IN SOVIET COTTON GROWING

The development of cotton growing in the U.S.S.R. over a long period of years and the future prospects of the schemes now in operation are fully discussed in a well-written article by Mr. Louis G. Michael, U.S. Agricultural Attaché in Belgrade, appearing in a recent issue of *Foreign Agriculture*, published by the U.S. Dept. of Agriculture Bureau of Agricultural Economics. Mr. Michael states that the problems facing the cotton breeders of the Soviet Union present many difficulties. It is to be expected, however, that better varieties of cotton will be developed than those now planted and that the quality of cotton will continue to improve. Yields per acre are also likely to improve with the spread of improved technique and increased skill among collective farmers.

While the acreage under cotton can be increased in the new regions, yields are likely to be low and the quality of the product relatively poor. It is improbable that the cotton acreage will be materially increased in Transcaucasia or Central Asia, where the best-quality cotton is produced, without the construction of costly irrigation works. There is much good land suitable for growing cotton in these regions, but the supply of water for irrigation is limited and the capacity of the irrigation systems now operating are already fully taxed to meet present requirements.

It is estimated that there are 4,621,000 acres in the Khorezm region in the lower Amu Daria Valley "completely fit for irrigation," 791,000 acres requiring slight reclamation, and 1,631,000 acres requiring extensive reclamation; whereas, in 1935, the seeded area in this region totalled 890,000 acres. On the Golodnaia Steppe is a large desert area suitable for irrigation. There are 1,236,000 acres of swamp land in the Fergana Valley that is suitable for drainage. It is reported that a retention dam in the upper Kura Valley would make 2,471,000 acres available for cultivation in Azerbaijan. Plans have been drawn for several other similar projects on which no actual construction work has been begun. It is probable that work on irrigation projects in Central Asia and Transcaucasia will first be directed toward improving defective systems already operating, many of which are badly in need of reconstruction, rather than undertaking major construction in order to bring significant new acreages under irrigation. Several plans were projected for development in 1937 in six districts of Uzbekistan, affecting 450,000 acres. Part of this development was designed to increase the water supply on land already

under cultivation. The programme of the Soviet Government does not contemplate an immediate expansion of the acreage under cotton. The plan for spring planting in 1938 calls for 5,108,000 acres as compared with the similar plan for 5,163,000 acres in 1937 and with 4,979,000 acres in 1936.

Production in 1936 was apparently in excess of the planned cotton consumption of the Soviet textile industry for 1937, in which year the industry planned to produce 4,190,000,000 yards of cloth. The actual output, however, was apparently only 3,284,000,000 yards. According to the Chairman of the Council of People's Commissars, stocks of cotton in the Soviet Union at the end of the year were stated to be "considerable and such as we have never had before," whereas in previous years there were hardly any carryover stocks and frequently difficulties were encountered in making supplies last until the end of the campaign.

The new Commissar of Light Industry recently stated that the Soviet textile industry is to produce 3,900,000,000 yards of finished fabrics and 617,000 short tons of yarn in 1938. This indicates a proposed increase of 19 per cent. in manufactured cotton goods over the 1937 accomplishment.

There is room for expansion in the manufacture of cotton goods in the Soviet Union because the per-capita consumption is undoubtedly low, although it is difficult to estimate just how low. In 1935, it was stated that the per-capita consumption of cotton was around 5.25 pounds compared with 21 pounds in the United States. In that year, mill requirement was stated to have been around 2,000,000 bales as compared with 1,750,000 bales before the World War. The 1936 requirement was stated to be 2,750,000 bales and the 1937 projected requirement 3,370,000 bales. This indicates an upward trend in the manufacture of cotton products, which has undoubtedly been accompanied by increased domestic consumption. Even today, however, there is no large per-capita consumption of cotton in the Soviet Union except in Central Asia. In other parts of the country, the people have been accustomed to wearing clothing made of wool and flax- produced, spun, and woven at home. The manufacture of cloth as a household industry has practically ceased. The degree of substitution of cotton goods for linen and woollens lies in the hands of the Government, which controls the quantities and kinds of goods that are placed on sale in retail stores.

Much is spoken and written about raising the standard of living of the masses of the people in the Soviet Union, and the degree to which this is accomplished will influence the consumption of cotton goods. The normal increase in population will also have its influence; but it is questionable whether, for some years to come, cotton requirements of the Government-owned textile industry of the Soviet Union will exceed the capacity of the farms to produce. This will depend upon the extent to which Government policy will foster domestic production of cotton and textiles. It is improbable, however, except in an unusual year, that production will result in any marked exportation of cotton to the markets of Western Europe. Thus, the Soviet Union in the near future is not likely either to export or to import cotton in any substantial volume.

COTTON PRODUCTION AND PRICES IN SOUTH AFRICA

The following article appeared in a supplement to the *Manchester Guardian Commercial* published recently.

Production of cotton in South Africa has always been closely related to the world price of this commodity. When world prices for cotton are high a keen interest in its production is evinced, but when prices recede the South African farmer rapidly loses interest in this crop. At the time of the Civil War in America, when prices were phenomenally high, cotton was for the first time grown in this country. In 1863 the ruling price for cotton was 58.5d. per pound, and the total production in South Africa was 3,414 lb. of lint. At that time production was confined to the eastern districts of the Cape Province. By 1867 production had increased to 110,090 lb. and the price had dropped to 10.5d. In 1913 with a price of 5d. per pound only 32,471 lb. were produced.

The cotton industry in South Africa witnessed its greatest expansion during the years 1918 to 1924. During these years the price varied from 12d. to 18d. per pound, and the highest production so far recorded in the Union was that of 6,774,423 lb. of lint in 1925. At that time the major centres of production were the northern portions of Natal and Zululand, the northern and western districts of the Transvaal, and the irrigated areas along the lower Orange River near Upington.

Under the relatively low prices which have obtained for this commodity since 1931, cotton production has been maintained in the neighbourhood of one million pounds per annum, as indicated by the following figures :—

Year.	Production of lint in lb.
1932-3	744,235
1933-4	975,987
1934-5	1,186,658
1935-6	792,806
1936-7	1,359,060

Factors which limit production in this country are drought and the attacks of insect pests. Of the latter, the following are the most serious :—
American Boll worm : *Heliothis obsoleta*, F. Stainers : *Dysdercus* spp.
Sudan Boll worm : *Diparapsiscastanea*, Hmps. Spiny Boll worm : *Earias* spp. Jassid : *Chlorita fascialis*, Jacobi.

In the case of the three types of boll worm mentioned there seems to be no economic means of control. Losses from jassid have been effectively checked through the extensive use of the jassid-resistant variety U₄ evolved at the cotton-breeding station conducted by the Empire Cotton Corporation at Barberton, N.E. Transvaal. The cost of this station is also partly met by a grant from the Union Government. U₄ is now planted throughout all the cotton areas of the Union except in the Orange River area where jassid is not a serious pest. Due to the exceedingly dry atmospheric conditions of the lower Orange River Valley, insect pests of cotton do not multiply as rapidly there as in the eastern portions of the country. Irrigation facilitates eliminate the danger of

losses from drought in this area. The soils of this region are exceptionally fertile, and phenomenal yields of high-quality cotton have been recorded there.

The prevailing low price of lint is the chief factor limiting production in the Orange River area, where such crops as sultanas, wheat, etc., bring in comparatively good returns when the price of cotton is low.

In other areas insect pests play a major role and continue to be the most serious factor limiting cotton production.

All seed-cotton produced in the Union of South Africa and Swaziland from which cotton lint is ginned is first classified and the lint pressed into high-density bales, the outside measurements of which are approximately 54 inches by 27 inches by 20 inches. The weight of bales is approximately 500 lb. gross and density about 30 lb. per cubic foot. Each bale is numbered and stencilled with the registered mark of the ginner.

Every bale of lint is officially graded by a Government grader, and no certificate is issued unless a sample from each bale has first been submitted to the grader. Government grading is final.

Sampling is conducted in the following manner :--One portion from the cotton lint filling the bottom of the pressbox, another portion when the pressbox is half-full, and a third from the top layers. By this method a true sample of the bale is obtained.

Cotton sold for export, which is about 90 per cent. of the crop, is shipped from the port of Durban. All sales are conducted at Durban, and purchases are made against Government grading certificates. This system has been carried on in a most successful manner for the past fourteen years.

FRENCH COTTON SYNDICATE

According to the *Manchester Guardian Commercial*, the French Government issued a decree recently for the promotion of cotton cultivation in Algeria on the lines advocated by the Colonial Conference of 1934-5. The preamble to this decree states that the initiative in the increase of production cannot be left to private enterprise alone; accordingly, a compulsory syndicate under State supervision is entrusted with the duty of taking the necessary steps. This syndicate includes all persons who cultivate cotton. It has to lay down guiding lines and principles, and to arrange credits for the farmers for the modernisation and improvement of their plant. If the steps recommended by the syndicate are not taken it can officially carry them out at the expense of those concerned.

Only one particular type of cotton is in future to be grown, in order to attain the maximum yield. This will enable a particular type, "Type Algérien," to be placed on the market. The syndicate has also to ascertain the regions in which cotton can suitably be planted, and it is also responsible for combating pests. A central fertiliser factory is being set up, out of public funds, under the control of the Algerian Government, for the supply of fertiliser for the Algerian cotton plantations.

Thus the whole of Algeria will be a one variety cotton community based upon the successful scheme which has been given legal powers in California some years ago.

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U.S. GOVERNMENT OCTOBER CROP REPORT

The report on the American cotton crop issued on October 8, by the United States Department of Agriculture shows that the average condition on October 1 was 66, against 65 a month ago, 79 on October 1 last year, and a ten-year average of 61.4. The average yield per acre is estimated at 221.1 lb., against 214.1 lb. in the last report, 249.8 lb. in last year's October report, and a final estimate of 266.9 lb. for the crop grown in 1937. The indicated production is 12,212,000 bales, exclusive of linters, which compares with 11,825,000 bales estimated a month ago, and actual crops of 18,906,000 bales and 12,399,000 bales in 1937 and 1936 respectively.

The crop in Lower California, which is not included in the United States total, is estimated at 44,000 bales against 52,000 last year.

The following table gives details of conditions with comparisons :—

	1938		1937	1936	10-year
	Oct. 1	Sept. 1	Oct. 1	Oct. 1	average
Missouri	81	78	77	71	68
Virginia	53	50	76	67	69
North Carolina	54	61	74	68	67
South Carolina	58	59	67	66	61
Georgia	56	57	75	66	63
Florida	68	67	75	74	69
Tennessee	74	75	80	66	64
Alabama	68	66	82	73	65
Mississippi	69	66	86	82	65
Arkansas	73	70	81	60	59
Louisiana	72	66	86	76	61
Oklahoma	62	60	64	26	50
Texas	63	63	79	52	60
New Mexico	81	87	94	85	84
Arizona	90	89	85	91	83
California	89	92	89	94	88
Other States	77	84	85	64	72
Average	66.0	65.0	79.0	61.8	61.4

Following are the details of production by States, with comparisons (in thousands of bales) :—

	Oct. 1	1938 Sept. 1	1937 crop	1936 crop
Missouri	350	287	404	308
Virginia	18	18	43	33
North Carolina	450	453	780	597
South Carolina	675	643	1,023	816
Georgia	866	878	1,500	1,086
Florida	27	27	40	31
Tennessee	500	473	661	433
Alabama	1,085	1,025	1,631	1,145
Mississippi	1,700	1,543	2,692	1,911
Arkansas	1,350	1,275	1,904	1,295
Louisiana	700	647	1,104	761
Oklahoma	550	617	773	290
Texas	3,200	3,200	5,154	2,933
New Mexico	103	107	163	111
Arizona	200	201	313	191
California	420	414	738	442
Other States	18	17	23	16
Total	<u>12,212</u>	<u>11,825</u>	<u>18,946</u>	<u>12,399</u>

In a supplementary report the United States Department of Agriculture states, regarding the above crop report, that during the past month the weather was generally favourable except in Oklahoma and North-west Texas, where drought conditions continued. Bolls opened rapidly and a larger than usual proportion of the crop was picked. No change is indicated in Texas production from the estimate made on September 1, but there was a further decrease in Oklahoma, which, however, was more than offset by marked increases in the Mississippi River States and also in Alabama, while South Carolina recovered part of the loss sustained in August.

MID-OCTOBER GINNING REPORT

The Census Bureau stated recently that up to the close of business on October 17, a total of 8,929,000 bales of this year's cotton crop had been ginned. This compares with 11,066,000 bales last year and 8,569,000 bales two years ago. The amount ginned since the last report made up on September 30 is 2,351,000 bales, against 2,806,000 bales in the same period last year and 2,537,000 bales in 1936. The total includes 113,000 round bales, 2,000 bales of Sea Island, and 8,000 bales of American-Egyptian, against 186,000 round bales, 2,000 bales of Sea Island, and 4,000 bales of American-Egyptian shown in the corresponding report last year.

The following table gives details of ginnings with comparisons :—

	1938	1937	1936
Alabama	863,000	1,202,686	953,069
Arizona	72,000	65,863	57,694
Arkansas	1,084,000	1,043,053	923,154
California	69,000	148,177	149,601
Florida	21,000	32,431	25,978
Georgia	716,000	1,125,923	807,696
Louisiana	621,000	824,055	668,835
Mississippi	1,447,000	1,660,767	1,541,379
Missouri	260,000	162,193	209,453
New Mexico	31,000	33,329	41,284
North Carolina	179,000	375,358	214,107
Oklahoma	403,000	351,286	190,680
South Carolina	510,000	629,678	409,973
Tennessee	321,000	268,182	275,613
Texas	2,321,000	3,122,706	2,081,900
Virginia	2,000	11,803	10,466
Other States	9,000	8,720	8,594
Total	8,929,000	11,066,210	8,569,476

CARRYOVER GRADE AND STAPLE

According to the U.S. Department of Agriculture 19 per cent. of the carryover of American cotton in America, which of course includes the cotton held in the various Government Pools was untenderable. The official report follows.

American upland cotton on hand in the United States on August 1, 1938, was a little lower in grade, on the whole, than last year's carryover of upland cotton, but about the same, on the average, in staple length. This year's carryover was the largest on record.

Of the total American upland cotton carried over, 43 per cent. was Middling White or above in grade ; 33 per cent. was Strict Low Middling and Low Middling White ; and 4 per cent. was Strict Good Ordinary and Good Ordinary White. Coloured cottons constituted 19 per cent. of this year's carryover.

American upland cotton shorter than $\frac{7}{8}$ inch in staple accounted for 12 per cent. of this year's carryover, compared with 14 per cent. last year ; cotton $\frac{7}{8}$ inch to $\frac{31}{32}$ -inch in staple accounted for 57 per cent. of the upland cotton carried over this year, whereas last year 56 per cent. was of these lengths. This year, 31 per cent. of the upland carryover was an inch or longer in staple, compared with 30 per cent. last year.

Of the upland cotton carried over, 81 per cent. was of tenderable grades and staples ; 79 per cent. of last year's carryover of upland cotton was of tenderable grades and staples.

According to the Freeport Sulphur Company, of Freeport, Tex., one of the largest producers of sulphur in the world, between 14 and 18 pounds of sulphur will enter into the production of every bale of cotton grown in America this year, either in the form of dusting for insect control, or for fertiliser.

COTTON LOAN PROGRAMME, 1938

The Agricultural Adjustment Administration announces that a cotton loan programme of 8·30 cents per pound on $\frac{7}{8}$ inch middling cotton, of the 1938 crop, with differentials for other grades and staples, had been recommended to the Commodity Credit Corporation by the Secretary of Agriculture. This loan has been approved by the Commodity Credit Corporation and the President.

The announcement by the Commodity Credit Corporation with regard to terms and conditions of the loan follows :—

Loans will be made to co-operating producers on the 1938 cotton crop upon the basis of 8·30 cents per pound for Middling $\frac{7}{8}$ inch cotton, with premiums and discounts for grades above and below Middling $\frac{7}{8}$ inch, in accordance with the attached schedule. Loans will also be made to non co-operating producers upon that portion of their production in excess of their marketing quotas of 60 per cent. of the rates applicable to co-operating producers.

Since the average price of $\frac{7}{8}$ inch Middling spot cotton, on the 10 spot markets designated by the Secretary of Agriculture, recently fell below 52 per cent. of the parity price of cotton, the Corporation is required by the Agricultural Adjustment Act of 1938 to make loans to co-operating producers of not less than 52 per cent. and not more than 75 per cent. of the parity price of cotton ; and to non-co-operating producers upon that portion of their production in excess of their marketing quotas at 60 per cent. of the rates of loans applicable to cotton produced by co-operating producers. Fifty-two per cent. of the parity price for cotton as of July 15, 1938, the latest date on which official figures are available, was 8·27 cents per pound.

Loans will be made directly by Commodity Credit Corporation, and by banks and other local lending agencies, under arrangements substantially similar to those pertaining to previous cotton loans. The Corporation, it was stated, has allocated the sum of \$100,000,000 for loans on the 1938 cotton crop. The loans will bear 4 per cent. interest and mature July 31, 1939.

Banks and other lending agencies may make the loans to producers upon cotton stored in approved warehouses and sell the notes to Commodity Credit Corporation from time to time prior to 30 days from the maturity of such notes, at par with accrued interest at the rate of $2\frac{1}{2}$ per cent. Such loans will be purchased only from banks and other lending agencies which enter into an agreement to pay the Corporation $1\frac{1}{2}$ per cent. per annum on the principal amount collected on such notes while held by the banks and other lending agencies.

Loans will be made only upon cotton represented by negotiable insured warehouse receipts issued by warehouses approved by Commodity Credit Corporation. Such approval will be made by the Manager of the Loan Agency of the Reconstruction Finance Corporation serving the district in which the warehouse is located. The districts served by each

Loan Agency of the Reconstruction Finance Corporation for cotton will be the same as those used in the 1937-38 loan programme.

All cotton must be classified according to the official cotton standards of the United States and such classification evidenced by :—

- (a) The classification shown on the warehouse receipt of a warehouseman licensed under the United States Warehouse Act ; or
- (b) A Form "A" Classification Memorandum of the U.S. Department of Agriculture ; or
- (c) A Form 1 Classification Memorandum of the U.S. Department of Agriculture ; or
- (d) A Federally Licensed Cotton Classifier's Certificate.

The official regulations concerning the loans and all loan document forms will be printed and made available by Commodity Credit Corporation at the earliest practical date, through the Loan Agencies of the Reconstruction Finance Corporation.

The following schedules give premiums and discounts under the loan programme :—

SCHEDULE 1. 1938-39 COTTON LOAN

Premiums and Discounts for All Growths of American Upland Cotton, except Irrigated Cotton Grown in Western Texas, New Mexico, Arizona and California.

Classified According to the Official Cotton Standards of the United States

Grade	Length of Staple*					
	$\frac{1}{16}$ Points	$\frac{7}{32}$ and $\frac{1}{16}$ Points	$\frac{1}{8}$ and $\frac{1}{16}$ Points	1 in. and $1\frac{1}{32}$ Points	$1\frac{1}{16}$ and $1\frac{3}{32}$ Points	$1\frac{1}{4}$ and Longer Points
White and Extra White						
Good Middling and Better	off 50	on 50	on 80	on 110	on 150	on 245
Strict Middling	70	30	60	90	135	230
Middling	110	Even	30	60	100	190
Strict Low Middling	190	off 60	off 30	Even	25	65
Low Middling	300	160	140	off 120	off 110	off 90
Spotted :						
Good Middling	off 100	Even	on 35	on 60	on 90	on 150
Strict Middling	120	off 20	15	45	75	110
Middling	200	80	off 40	off 15	10	40
Tinged :						
Good Middling	off 180	off 50	off 35	off 10	on 10	on 60
Strict Middling	210	80	55	35	off 10	35
Yellow Stained :						
Good Middling	off 290	off 150	off 120	off 100	off 80	off 60
Grey :						
Good Middling	off 180	off 60	off 40	off 20	Even	on 60
Strict Middling	200	80	60	40	off 20	30

* Loans will not be made on cotton untenderable in grade on futures contracts subject to Section 5 of the United States Cotton Futures Act, or on cotton shorter than $\frac{1}{8}$ inch in staple length.

SCHEDULE 2. 1938-39 COTTON LOAN

Premiums and Discounts for Irrigated Cotton Grown in Western Texas,
New Mexico, Arizona and California.

Classified According to the Official Cotton Standards of the United States.

Grade	Length in Inches*			
	$1\frac{1}{8}$ and $1\frac{1}{4}$	1 in. and $1\frac{1}{8}$	$1\frac{1}{8}$ and $1\frac{1}{4}$	$1\frac{1}{4}$ and Longer
White and Extra White				
Good Middling and Better	on 55	on 95	on 120	on 140
Strict Middling	45	85	110	130
Middling	15	45	70	90
Strict Low Middling	off 90	off 80	off 60	off 45
Spotted :				
Good Middling	off 70	off 60	off 50	off 45
Strict Middling	80	70	60	55
Middling	145	135	130	130

* No loans will be made on grades of cotton not specified above, or on cotton shorter than $1\frac{1}{8}$ -in. in staple length.

Commenting on the 1938 Government Cotton Loan announcement the *New York Journal of Commerce* states as follows :—

“ The Government is loaning prices without regard to location of the cotton. This means that it will pay the same price, 8·30 cents basis middling $\frac{7}{8}$ inch, at markets such as Houston-Galveston, New Orleans or south-eastern mill points as it will pay at interior points such as Fort Worth, Lubbock, Oklahoma City, Memphis or others. Since it costs as much as 80 points to move cotton from some disadvantageous interior points to the ports, this means that so long as cotton is available at points contiguous to the port and mill centres at or near the Government loan level, it will be impossible for the interior markets to sell a bale of cotton in the open market and realise as much on it as they can get from the Government loan. Therefore, indications were that interior producers probably would be heavy borrowers from the Government under the loan.”

Press commentaries from U.S.A. point to the fact that while the large world supply of cotton is reflected in a relatively low current price of cotton, the income of cotton producers during the next few months will be substantially supplemented by the cotton price adjustment and agricultural conservation payments. Payments which will go to cotton producers under these two programmes during the next few months are expected to amount to about \$260,000,000. These payments will go to all cotton producers who have co-operated in the 1938 cotton acreage adjustment programme. The price adjustment payments will average about 2·9 cents per pound on 60 per cent. of each co-operating producer's 1937 cotton base production. The 1938 agricultural conservation payment is at the rate of 2·4 cents per pound on the normal yield of the co-operating producer's 1938 cotton acreage allotment. These combined payments, if added to the current average price of cotton, indicate an income to cotton producers of about 12·5 cents per pound on the estimated production of 11,988,000 bales for 1938.

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MARKETING PLAN APPROVED FOR ONE-VARIETY COTTON

A programme designed to improve marketing practices and to demonstrate to foreign spinners the high quality of American cotton being produced in one-variety communities, was announced recently by the Agricultural Adjustment Administration. Under the programme a total of not more than 20,000 bales of cotton will be selected from one-variety communities and carefully ginned and baled. It will be sold to foreign spinners in lots assembled from the same one-variety area.

The cotton will be purchased from growers by marketing agencies on a net weight basis and will be sold abroad on the same basis. The cotton will be sampled at the gin and information as to variety, grade, staple, and point of production will be retained and made available to foreign purchasers.

In order to insure the selected cotton being available for this programme, the co-operating marketing agencies will pay 10 points, or 50 cents per bale, above the local market value for cotton of corresponding grade and staple. To offset this higher price and to remunerate for the additional expenses involved in the special handling prescribed under this programme, payments of \$3.00 per bale will be made by A.A.A. to the co-operating marketing agencies.

"A large number of one-variety communities have been established in various parts of the cotton belt for the purpose of producing cotton of high quality," Lawrence Myers, chief of the A.A.A. Marketing Section, said. "By mutual agreement farmers in these communities plant a single variety of improved cotton. The movement could be expanded to cover virtually the entire belt. Many domestic mills are already taking advantage of the improved cotton available in these communities. This programme will bring this high-quality cotton to the attention of foreign spinners also. The offering of such cotton in foreign markets, graded and packaged in a superior manner, should strengthen the preference for American cotton on the part of foreign spinners.

"In recent years, foreign spinners here, complained on occasion that some American cotton was carelessly packaged and that grade and staple in some bales were not uniform."

The programme is based on the recommendations of a special sub-committee representing several bureaux in the Department of Agriculture and the Farm Credit Administration. These agencies will assist in carrying out the programme. The Bureau of Plant Industry will be responsible for the selection of the one-variety communities from which the cotton will be assembled; the Bureau of Agricultural Engineering will be consulted with respect to ginning; the Bureau of Agricultural Economics will be responsible for the classification, and will co-operate in obtaining information from foreign spinners with respect to their experience in using this cotton.

In connection with the above A.A. programme the Agricultural Adjustment Administration has accepted an offer made by a southern cotton mill for the manufacture of one million patterns of cotton bagging to be used as a covering for cotton bales under the A.A.A. diversion programme. The offer will supply the entire quantity of cotton patterns called for in this programme, comprising enough to cover one million bales, at a cost per pattern of not more than that of ordinary bale covering.

The programme makes possible the first comprehensive and widespread use of cotton as bagging material—a purpose long advocated by cotton growers and cotton mills, A.A.A. officials pointed out. The plan was formulated in response to repeated requests by the industry and follows distribution of 16,000 bale coverings in a trial programme conducted in 1937 to demonstrate the practicable worth of cotton in this use.

The use of the bagging material in all cotton producing States will be confined under the present programme to communities having one-variety or improved cotton in order to concentrate its use and make possible a thorough check of the results of the programme.

The established practice of buying baled cotton on a gross weight basis remains as a major handicap to the use of cotton bagging for bale covering.

The combined average weight of ordinary bagging and the steel ties used in baling cotton is 22 lbs., compared with 14½ lbs. when cotton bagging and steel ties are used. Because of the present practice, the reduced gross weight of cotton covered bales results in a loss to the farmer which amounts to about 75 cents a bale when cotton is selling at 10 cents a pound.

The International Cotton Committee, at its meeting held in London in 1932, was of the opinion that the sale of cotton covered bales on net weight basis would be an advantage to the trade, and, at a later meeting, most of the national associations affiliated to the International Cotton Federation expressed themselves in favour of this opinion. All cotton exchanges in the world were asked by the International Federation to modify their rules accordingly.

The U.S. Cotton Textile Institute favoured the adoption of net weight trading in baled cotton in a resolution passed in October, 1936. Through the Institute, cotton mills of the United States representing over four million spindles indicated last spring that they would make proper allowance in purchasing cotton wrapped in cotton.

These mills, in buying cotton bagged bales, have agreed to make an allowance, amounting to a premium, based on the current price of cotton, for the lighter tare weight of such bagging as compared to other materials used for this purpose.

The Lane Cotton Mills (the firm referred to above, from whom the Agricultural Adjustment Administration has accepted an offer for the manufacture of one million patterns of cotton bagging) makes the sale of the patterns at 45 cents each—cheaper than jute bagging, which is selling

at 72 cents and more per pattern. The Lane Cotton Mills have also been experimenting with cotton ropes, used instead of steel bale ties.

A pattern of jute weighs 1 lb. The steel ties for a bale weigh 9 lbs. The modification of tare is regarded as a matter of some importance, but it is the greater utility of the rope and the prospective increased consumption of cotton that appears to be of the higher interest.

Figuring on the use of 2 lbs. of cotton rope to the bale, rough computation indicates that this new use would consume 50,000 bales of the raw cotton for 12,000,000 bale crop. No other textile, it is believed, would be acceptable for this purpose since even twine of harsher materials, such as sisal, have caused trouble and damage in mills and occasioned a shift to cotton twine. This new type of bale, cotton in cotton and in nothing but cotton, is shown in photograph of what is regarded as another significant piece of pioneering.



The two bales on the left are bound with iron hoops and those on the right with $\frac{3}{8}$ in. cotton rope. The covering is cotton cloth in both cases. These bales have been shipped to Europe and back to U.S.A. to see how the cotton rope stands up to the treatment during shipment.

Cotton mills representing 7,600,000 spindles, or an estimated 28 per cent. of the industry, have agreed to accept cotton wrapped in cotton bagging, according to the Cotton-Textile Institute. More than 125 mills in 19 States have agreed to make allowance for higher weight of tare in purchasing cotton wrapped in cotton, the Institute reports.

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THE UNITED STATES COTTON PROBLEM

The following is extracted from the October 1938 monthly review of the National City Bank of New York.

In the years from 1865 to 1900 U.S. exports of cotton averaged twice the home consumption, and competition in foreign markets was negligible; but the World War worked many changes, and has had lasting effects upon cotton and cotton goods.

The war and the boll weevil together raised cotton to an average of 38.3 cents per lb. in 1919-20, with a peak of 43 $\frac{3}{4}$ cents. Under the stimulus of high prices, our cotton acreage reached the high point in 1925-1926, in each of which years the plantings were about 46,000,000 acres. The crop of 1925 was 16,123,000 bales, the largest on record, and the crop of 1926 was 17,755,000 bales, making a new record. Under the weight of the two crops the New York price broke to 12.2 cents, but with lower prices exports in the two crop-years aggregated 19,000,000 bales, and in 1928 the price rallied to an average of 20 cents. In 1929 the Federal Farm Board was established to support farm prices, and attempted to fix cotton at 18 cents, but the price declined to 8 $\frac{1}{4}$ cents in 1930-31, and when another 16,600,000 bales came in 1931 the price broke to a low of 5.3 cents.

In 1933 the Government's policy was changed to acreage restriction, and it bought and ploughed under 10,000,000 acres of growing cotton. The 1937 crop was restricted to 34,500,000 acres, but perverse Nature gave a yield of 18,916,000 bales, another new record. The Government offered loans of 9 cents a pound on the crop, which supported the market, but it accumulated a stock of 7,000,000 bales, and this year the loans were reduced to the minimum permissible under the Farm Act, or 8.30 cents. The 1938 plantings were reduced under the allotment plan, by about 23 per cent., but the present farm price is the lowest since 1932. Moreover, there is talk of another acreage cut next year.

Meanwhile, the foreign crop has more than doubled from the average production of the four years 1921-24, and it may rise higher if the United States is successful in raising the price. No one familiar with the cotton trade doubts that if the United States is willing to sacrifice its own cotton

production to raise the world price, it will have a measure of success ; or doubts that by so doing it will continue to be a diminishing factor in the world supply. Competition cannot be met successfully by backing away from it.

The following table shows the average yearly consumption of American cotton in U.S.A., in Great Britain, on the Continent of Europe, in the Orient and elsewhere, in five year periods from 1909 to 1934 and the last four crop years. The second part of the table shows the increasing consumption of foreign cotton since 1921 :—

CONSUMPTION OF AMERICAN COTTON.

5-Year Average.	(000's of Running Bales.)					Else-where	Grand Total
	United States	Outside U.S.	Great Britain	Continent	Orient		
1909-14	4,869	8,283	3,215	4,585	314	169	13,152
1914-19	5,980	5,946	2,748	2,425	572	201	11,926
1919-24	5,594	5,954	1,916	3,025	815	198	11,548
1924-29	6,457	8,317	2,006	4,718	1,342	251	14,774
1929-34	5,438	7,516	1,285	3,906	2,100	225	12,954
1934-38 *	6,207	5,805	1,139	2,717	1,662	287	12,012

CONSUMPTION OF FOREIGN COTTONS.

5-Year Average	(000's of Bales)					Else-where	Grand Total
	United States	Outside U.S.	Great Britain	Continent	Orient		
1921-24†	322	8,093	1,113	1,661	4,712	607	8,415
1924-29	296	9,690	1,142	2,636	5,102	810	9,986
1929-34	177	10,959	1,162	3,548	5,487	762	11,136
Crop Year							
1935-36	130	15,075	1,541	5,167	7,264	1,103	15,205
1936-37	182	17,716	1,887	6,057	8,593	1,179	17,898
1937-38	140	15,360	1,560	6,280	6,320	1,200	15,500

* Four-year average. † Three-year average.

Source : Cotton Year Books of the New York Cotton Exchange.

First should be noted the declining consumption of American cotton in Great Britain, which at one time took the greater part of our exports. Note also the decline on the Continent, and the growing use of foreign cotton in Britain and on the Continent. The average annual aggregate consumption of our cotton in Great Britain and Europe in the five year period ended 1914 was 7,800,000 bales and in the four years 1934-38, only 3,856,000 bales, an average loss of 3,944,000 bales, or more than one-half the 1909-14 annual average.

As to foreign cotton, available reports do not go back later than 1921, but in the three years 1921-24 the average yearly consumption by Britain and the Continent was 2,774,000 bales, and in 1936-37 was 7,944,000 bales, an increase of 5,170,000 bales. In the grand total column the American figures are lower in 1934-38 than in 1909-14, while foreign cotton is up more than 7,000,000 bales from 1921-24 to 1937-38.

Our loss of sales to Great Britain and the Continent was partially offset by gains in the Orient and elsewhere ; but these gains cannot be counted as permanent. The showing of greatest significance is the increasing production of both cotton and cotton goods in the low wage countries of Asia, Africa, and Latin America.

It is not strange that some of our Southern friends, true to instinct and training, turn naturally to the protective tariff as the mother of

iniquities, but we submit that the tariff is not the vital factor in the cotton problem. While it is true that trade relations with other countries require a two-way movement, the first condition of foreign trade is ability to meet foreign competition, in both quality and price. Our cotton is better in quality than most of its competitors, but the foreign quality is improving, and price may make up for quality. It is an old story that the per-acre-yield of cotton in this country might be better. Thousands of cotton farmers produce above the average. It may be increased by better seed, better cultivation, more adequate use of fertilizers, or by new and improved machine equipment, as Northern farmers have cheapened grain production. It is not too much to say that two important gains are possible, viz. : the quality of American cotton may be improved and the cost of production may be reduced.

AN AMERICAN VIEW OF THE SPINNERS' COMPLAINTS

Mr. P. K. Norris, Senior Marketing Specialist of the U.S. Dept. of Agriculture Bureau of Agricultural Economics stated during the course of an address which he gave at College Station, Texas, that there has been a feeling in the American cotton trade that the desire of the customer is not so important. He continued :—

We have been selling our cotton abroad largely because our customers could not get the cotton they wanted from other countries, but today, with increased foreign supplies on the market, some of our customers are trying foreign cotton and finding they like it.

Let us look into this question of pleasing the foreign customer. What about the cotton we are growing? What kind of cotton is it? During the past season almost 19 per cent. of all the cotton ginned in Texas was less than $\frac{3}{4}$ of an inch in staple length. That is almost one-fifth of the total crop. About 94 per cent. of it was less than an inch. Only a little more than 6 per cent. was an inch or longer. Many varieties of cotton are grown in Texas, not because there is a demand for the staple they produce but because farmers think they can, and in many cases do, get as much for short staple as long staple. The "hog round" system of buying cotton is responsible for this. If it is not discontinued it will defeat any movement for the production of longer staple varieties in this State.

But this is not all of the story. Some of Texas cotton is ginned wet and is badly gin cut. The damage to a wet bale may amount to as much as two to five dollars. Spinners don't like damp, gin-cut cotton. Then there is the matter of the "mixed bale." Your customers don't like "mixed bales" either. They call them "false pack" which includes "plated bales," "two-sided bales," "gin-cut bales" and "country-damaged bales." We do not need to define these terms. We know what they are and how they happen to come into existence. But, regardless of this your customers don't like them. We can't expect spinners to go on buying our cotton if they don't like it.

Then there is the complaint of spinners about loss due to our methods of handling cotton. When we look at this handling problem and the losses resulting from it we can't blame them.

As the bale enters the channels of trade it passes from buyer to buyer, each cutting a hole in both sides of the bale and removing a sample of cotton. As a result the bale is in a pretty ragged condition by the time it reaches the compress. Here it receives a number of patches, added with a view to correcting some of the damage done to the bagging by the cutting and slashing of the various cotton buyers. The job of correcting this damage, however, is done so quickly that it is largely ineffective and often detracts from the value of the bale rather than adding to it. The bale moves on through the trade and is eventually stored in the warehouse of a foreign spinner. Here it is opened, preparatory to spinning, and here we get the attitude of the spinner towards our cotton.

Spinners realise that because of the system of irresponsible sampling and handling, because of damage from moisture and gin cuts and because of inadequate protection to the bale that results in dirty, soiled, and stained lint, they are going to lose a certain amount of weight of all American bales. In years when no other cotton was available they were not in a position to do very much about this, but today with a supply of about 19,000,000 bales of cotton of other than American growths a number of your former customers are buying cotton other than American.

In conclusion, Mr. Norris stated :—

What is the solution to the problem of supplying the customer with the kind of cotton he wants? Briefly stated, it is this: Produce a uniform staple of desirable length, in sufficient quantities to supply spinners. A start has been made. One-variety communities are a big step in this direction. You must have the kind of cotton that the foreign spinner wants. This is first and fundamental.

Second, you must handle it in a manner that protects its value. Many foreign bales are not worth as much as the average American bale, but they are all picked, ginned, pressed, wrapped, and handled in a manner that protects the value of the lint to a much higher degree than the average American bale. We must see to it that the men who handle American cotton between the growers and the spinners, the delivery boys, do not destroy its value by their careless methods of handling and compressing. There is no reason why the people who handle American cotton cannot do as good a job of protecting its value as do the handlers of foreign cottons. If it is the fault of the system we should determine what corrective means should be taken.

Third, we must sell our cotton on the same basis as other countries. This means we must sell on net weight. There is no reason why we should pay freight on excessive bagging and ties; there is no reason why foreign spinners should be asked to continue to buy American cotton on gross weight when practically every other country in the world sells on net weight.

Fourth, growers must receive the full value for the cotton they grow. If you grow staple cotton, if you gin it and handle it properly and offer

it to the spinner under conditions satisfactory to him, he will pay for it on that basis. Spinners pay more for good cotton than for poor cotton but growers do not always receive more. The elimination of "hog round" buying would help. When farmers receive premiums for staple they will grow staple cotton.

COTTON HARVESTING AND HANDLING

The following is an extract from an interesting article contributed to a recent issue of the *Cotton Ginners' Journal* by Francis L. Gerdes and William J. Martin, of the U.S. Department of Agriculture, Bureau of Agricultural Economics, and Charles A. Bennett, of the Bureau of Agricultural Engineering :—

Staple length is largely determined by the variety planted and cannot be improved after the crop is made, but the grade, although occasionally influenced by variety, is largely dependent upon weather conditions during the harvesting season, upon the method and care used in harvesting and handling, and upon the ginning operations and methods employed. Much can be done by the farmers in modifying or improving their methods of harvesting and handling cotton that will make their farming operations more profitable and the problems of ginning their cotton less complicated.

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Harvesting is one of the more costly items entering into cotton-production expense. It usually amounts to about 20 per cent. of production costs. According to figures collected and compiled by the Bureau of Agricultural Economics, picking charges during the ten-year period ending with the crop of 1936 ranged from an average of 41 cents per cwt. of seed cotton in 1931 (the year producers received an average price of only 5.66 cents per lb. of ginned lint) to \$1.12 per cwt. of seed cotton in 1927 (when the price per lb. of ginned lint reached 20.19 cents or the highest level for the ten-year period).

Besides being important from the standpoint of cost, cotton harvesting is important from the standpoint of time required. On the average farm, it usually takes about three months to gather a crop even if the cotton is picked as the bolls open, or soon after. Because of the hazards of weather damage much labour must be kept continuously at the job of gathering the crop. In good cotton years there is often a shortage of labour. The weather conditions and the labour situation are the real problems in the successful harvesting of a high-grade crop.

In the farming system that prevails in the eastern part of the Cotton Belt, the tenants who live on the farms the entire year supply most of the labour for cotton hoeing and harvesting. Practically all of the cotton in this area is hand-picked. By always having labour available, the picking is recurrent and the fields are gone over several times.

In the newer sections of the south-western part of the Cotton Belt, where farm mechanisation is freely practised and not much labour is needed before the harvest, cotton growers use transient workers. These migratory workers lack the incentive to harvest cotton in good condition which workers have who live on the farm. That is, transient workers are inclined to pick cotton so rapidly and carelessly that it has an excess of foreign matter when delivered by the pickers. The same difficulty is encountered by growers in other areas when the farm labour is supplemented by temporary hired hands.

In the western sections of Texas and Oklahoma "snapping" has become a popular method of harvesting. Weather conditions during the growing season and labour shortages undoubtedly encourage quick ways of harvesting in these sections. If the rainfall during the growing period is so insufficient that the bolls do not mature properly, they are too small for the cotton to be picked conveniently and the entire bolls are therefore removed from the stalk by hand. Frost prevents many of these and other bolls from reaching full maturity. This immatured or unmaturred cotton (together with cracked and partly opened bolls) is harvested "bolls and all" after frost when the bolls are easier to pick. Generally, this operation is required only once during the season, or when all the cotton is open and ready to be harvested.

These western growers do not have the rainy weather during this last part of the season that troubles the eastern growers. In the East, if harvesting is delayed until late in the season, the quality of the cotton is usually badly damaged by exposure to the autumn rains. Besides, the fact that the weather encourages quick snapping of the crop all at one time, the short-staple cotton grown there, and the failure of buyers to make

price distinctions between different qualities, help to encourage this method. Even the cotton that is hand-picked in these areas varies greatly in the nature and extent of foreign matter present, and there are indications that it is now harvested in a rougher condition than was true during previous decades.

Good present-day gin machinery has facilities for doing a good job of conditioning and cleaning but it cannot completely restore potential qualities to cotton that has been harvested carelessly. Moreover, the very fact that a gin is equipped with machinery that can make lint of good quality from either damp or trashy cotton sometimes causes cotton growers to harvest their cotton carelessly. Some think that the gin will give a good sample under these conditions. This makes the ginner's problems more acute.

Thus these questions concern both the farmers and the ginner's. They can be handled in a very practical way if there is a mutual understanding of the problems involved.

AMERICAN COTTON AND THE CHINESE COTTON TEXTILE INDUSTRY

During the course of an interesting article by Mr. Fred J. Rossiter appearing in the September 1938 issue of the U.S. Dept. of Agriculture publication *Foreign Agriculture*, the writer states that it is apparent that in recent years American cotton has been rapidly vanishing from the Chinese market. When American piecegoods, followed by those of British manufacture, were forced out of the Chinese market under the pressure of cheaper Japanese goods, the loss was at least partially compensated by increased Japanese purchases of American cotton. But in the past four or five years, imports of all foreign piecegoods into China have declined to the vanishing point. In India, reduction in the final consumption of American cotton has been caused by the drastic decline in imports of British piecegoods; in China, to the virtual disappearance of imported cotton goods must be added the equally sharp reduction in imports of American raw cotton, large volumes of which were imported in the decade of 1925-1934.

From 1910 through 1929, slightly less than 500,000 bales of American cotton went into the making of piecegoods imported into China, but by 1936 the estimated volume had shrunk to only 30,000 bales. The total disappearance of yarn imports, which prior to and immediately after the war contained a considerable quantity of American cotton, is another factor in the elimination of American cotton from China. Chinese consumption of American raw cotton in 1936 declined to 80,000 bales compared with an annual average of 238,000 bales for 1925-1929, a total of 659,000 bales in 1931, and a peak of 950,000 bales in 1932. Leaving out of consideration the high levels attained in 1931 and 1932, it is estimated that, prior to 1930, the yearly consumption in China of American cotton in the form of raw staple, imported piecegoods, and yarn exceeded

700,000 bales. In 1936, this volume was only slightly over 100,000 bales, indicating a net loss of 600,000 bales.

The precipitous decline in the direct and indirect consumption of American cotton in China was caused by the expansion of the textile industry and the increase in domestic cotton production. Until recent years, the country consumed an important quantity of foreign cotton, in the form of imported yarn, of piecegoods, or of raw cotton; but today, in spite of a larger domestic consumption, China produces practically all of its own requirements. Under the conditions of relative tranquillity and gradually improved economy that existed in a measure in China at the beginning of the Sino-Japanese war in the summer of 1937, the textile industry was primed for further expansion. It is likely that this development would have spelled a further diminution in the ultimate consumption of American cotton in China.

On the other hand, consumption of American raw cotton, as distinguished from American cotton utilised in the production of goods imported into China, might have been stimulated to a certain extent, despite the upward trend of cotton production in China. A long period of peace, accompanied by financial stabilisation, economic reforms, the consequent improvement in the standard of living of the Chinese people, and increased consumption of cotton goods, particularly those made of yarn of finer counts, might have increased cotton consumption in China faster than Chinese production of raw cotton. Under such circumstances, greater imports of American, especially when prices were not out of line with those of competitive growths, might have taken place.

STANDARDS ESTABLISHED FOR SEA ISLAND COTTON

The U.S. Department of Agriculture announced on August 11 that an order promulgating official standards for Sea Island cotton was issued by Secretary Wallace the previous day.

The growing of Sea Island cotton has been revived during the past few years in Georgia and Florida with an indicated 1938 crop of about 6,000 equivalent 500-lb. bales. Various persons interested in cotton of this variety have requested the Department to establish standards of quality which may be used in its purchase and sale.

The new standards embrace six full grades numbered 1 to 6 inclusive, and five half grades for qualities between the full grades. Cotton which is lower in quality than grade No. 6 is designated as "Below Grade No. 6."

Grade boxes for the six full grades will shortly be available for sale to the public at \$5 each, f.o.b., Washington, D.C., and staple length types for the lengths $1\frac{1}{2}$, $1\frac{3}{16}$, $1\frac{5}{8}$, and $1\frac{3}{4}$ inches will also be available at \$1 each, f.o.b., Washington. The Bureau of Agricultural Economics will supply order forms for the standards on request.

These new standards will become officially effective on August 10, 1939, but under the terms of the order of promulgation they may be used meanwhile permissively in the purchase and sale of Sea Island cotton.

SUPPLY AND DISTRIBUTION OF COTTON IN THE UNITED STATES

Linters are Included for the Years 1905-6 to 1912-13 Inclusive, but
are Excluded for the Years 1913-14 to 1937-38

(Compiled from reports of the U.S. Department of Commerce.)

Year	SUPPLY			DISTRIBUTION		
	Production, running bales*	Carry-over from previous year	Imports equivalent 500-pound bales	Exports, running bales*	Consump- tion, running bales*	Stocks on hand at end of year
	1,000 Bales	1,000 Bales	1,000 Bales	1,000 Bales	1,000 Bales	1,000 Bales
1905-06	10,495	1,935	133	6,975	4,877	1,349
1906-07	12,983	1,349	203	8,825	4,974	1,515
1907-08	11,058	1,515	141	7,780	4,493	1,236
1908-09	13,086	1,236	165	8,890	5,092	1,484
1909-10	10,073	1,484	151	6,492	4,622	1,040
1910-11	11,568	1,040	231	8,026	4,498	1,375
1911-12	15,553	1,375	229	11,081	5,129	1,777
1912-13	13,489	1,777	225	9,199	5,483	1,648
1913-14	13,983	1,511	266	9,256	5,577	1,366
1914-15	15,906	1,366	364	8,323	5,597	3,036
1915-16	11,066	3,036	421	5,896	6,398	3,140
1916-17	11,364	3,140	288	5,300	6,789	2,720
1917-18	11,248	2,720	217	4,288	6,566	3,450
1918-19	11,906	3,450	197	5,592	5,768	4,287
1919-20	11,326	4,287	683	6,545	6,420	3,563
1920-21	13,271	3,563	211	5,745	4,803	6,534
1921-22	7,978	6,534	352	6,184	5,910	2,832
1922-23	9,729	2,832	430	4,823	6,666	2,325
1923-24	10,171	2,325	272	5,656	5,681	1,556
1924-25	13,639	1,556	303	8,005	6,193	1,610
1925-26	16,123	1,610	314	8,051	6,156	3,543
1926-27	17,755	3,543	382	10,927	7,190	3,762
1927-28	12,783	3,762	321	7,540	6,834	2,536
1928-29	14,297	2,536	442	8,044	7,091	2,312
1929-30	14,548	2,312	368	6,690	6,106	1,530
1930-31	13,756	4,530	99	6,760	5,263	6,370
1931-32	16,620	6,370	107	8,708	4,866	9,678
1932-33	12,710	9,678	140	8,419	6,137	8,165
1933-34	12,664	8,165	148	7,534	5,701	7,744
1934-35	9,472	7,744	107	4,764	5,300	7,209
1935-36	10,367	7,209	155	5,073	6,348	5,409
1936-37	12,141	5,409	253	5,440	7,950	4,499
1937-38	18,252	4,499	159	5,598	5,756	11,533

* Round bales counted as half bale

UNITED STATES EXPORTS OF COTTON, BY PRINCIPAL COUNTRIES

Destination	Cotton Season, August 1 to July 31					
	1937-38	1936-37	1935-36	1934-35	1933-34	1932-33
	(Quantity in 1,000 Bales)					
Germany	656	650	765	342	1,318	1,849
United Kingdom	1,552	1,144	1,410	738	1,278	1,492
Japan	691	1,550	1,479	1,524	1,846	1,743
France	716	655	681	373	709	864
Italy	505	398	380	474	649	804
Canada	246	307	248	225	270	176
Poland	233	174	262	210	240	180
Belgium	190	154	157	97	121	183
Netherlands	117	87	67	57	111	126
Sweden	84	87	84	85	77	64
China	(a) 23	14	36	108	375	301
Spain	(b) 1	(b)	207	240	275	313

(a) In addition, 51,000 bales were exported in 1937-38 to Kwantung, destined mainly for cotton mills in North China.

(b) 1,260 bales in 1937-38, compared with only 279 bales in 1936-37.

(U.S. Dept. of Commerce)

AMERICAN COTTON

IMPORTS OF FOREIGN COTTON INTO U.S.A.

August 1, 1937, to July 31, 1938, with Comparisons

(500-pound bales)

Country of production	1913-14	1933-34	1934-35	1935-36	1936-37	1937-38	5-year average 1933-37	Per cent. this year is of 5-year average
Egypt ..	138,579	96,523	71,176	65,602	75,268	43,499	75,274	57.8
Peru ..	12,627	3,644	1,192	1,125	1,740	744	2,751	27.0
China ..	20,772	18,321	8,185	25,914	51,438	16,491	29,929	55.1
Mexico ..	80,285	2,652	5,137	3 387	27,391	43,598	7,715	565.1
India ..	7,849	25,987	24,903	57,655	79,115	48,040	38,511	124.7
Other countries	876	989	1,438	1,134	18,082	6,643	4,506	147.4
Total ..	260,988	148,116	107,031	154,817	253,034	159,015	158,685	100.2

(United States Dept. of Agriculture)

AMERICAN COTTON CONSUMPTION IN U.S.A.

July, 1938, with Comparisons

(Exclusive of linters)

Month	1913-14	1933-34	1934-35	1935 36	1936-37	1937-38*	5-year average 1932-33 to 1936-37	Per cent. this year is of 5-year average
	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Per cent.</i>
Aug. ..	432,350	588,902	418,941	408,325	575,014	604,380	479,136	126.1
Sept. ..	442,435	499,482	294,696	450,647	629,767	601,837	473,467	127.1
Oct. ..	511,923	504,055	523,032	552,840	651,086	526,464	546,581	96.3
Nov. ..	456,356	475,247	480,081	512,312	625,794	484,819	519,174	93.4
Dec. ..	456,262	347,524	417,344	499,773	694,841	433,058	479,984	90.2
Jan. ..	517,299	508,021	550,553	590,484	678,786	434,740	559,605	77.7
Feb. ..	455,231	477,046	480,339	515,977	665,677	427,528	516,048	82.8
Mar. ..	493,354	544,870	482,373	550,641	776,942	510,941	570,002	89.6
Apr. ..	499,646	512,594	468,402	576,762	718,975	414,392	549,418	75.4
May ..	466,744	519,299	470,412	530,894	669,665	425,684	562,166	75.7
June ..	446,145	363,262	383,982	555,449	680,521	442,742	536,095	82.6
July ..	448,333	359,951	390,712	607,056	583,011	449,511	508,274	88.4
Total 12 months	5,626,078	5,700,253	5,360,867	6,351,180	7,950,079	5,756,096	6,299,950	91.4

* Subject to slight revisions.

(United States Dept. of Agriculture)

QUALITY COTTON

A communication from College Station, Texas, states that three of the 213 one-variety cotton community associations in Texas, Lone Tree in Victoria County, Munday in Knox County, and Seymour in Baylor County, have been selected as the state's source of cotton in the Agricultural Adjustment Administration's 20,000 bale experiment. All these communities produce Acala cotton which has a staple of about $1\frac{1}{16}$ in.

The programme is designed to improve marketing practices and to demonstrate to foreign spinners the high quality of American cotton being produced in one-variety communities.

The 20,000 bales of uniform, carefully picked and properly ginned cotton will be selected by the Bureau of Atricultural Economics, according to F. E. Lichte, ginning specialist of the Texas A. and M. College

Extension Service. The bales will be covered with cotton bagging and samples will be taken at the gin press box and information as to the variety, grade, staple and point of production will be made available to foreign purchasers.

The bales will be handled in accordance with the best accepted practices at the gin, at the compress, and in transit. "In recent years, foreign spinners have complained on occasions that some American cotton was carelessly packaged and handled and that grade and staple in some bales was not uniform," Lichte said. "There has been persistent complaint, of course, over the general deterioration of grade and staple. This experiment is an attempt to show that America is making an effort to produce and handle correctly a quality cotton."

The programme was recommended by a special committee representing several bureaux in the U.S. Department of Agriculture and the Farm Credit Administration, and these agencies, together with various commercial marketing, compressing, and exporting firms, will co-operate in carrying out the plan. The A.A.A. will provide a payment of three dollars a bale to co-operating marketing agencies in compensation for the additional expenses involved.

MARKET REPORTS

Mr. C. T. Revere, of Munds Winslow and Potter, wrote under date September 23 as follows :—

In respect to cotton, we might state at the outset that we see little occasion for expecting any immediate wide departure from the narrow price swings witnessed recently. The effect of the unfavourable supply situation has been nullified for at least some time to come by the operation of Government loan. Although no official figures have been published, Southern advices state that cotton is beginning to move more rapidly into the loan. Sales on certain days this week, as for example, Wednesday, amounting to more than 51,000 bales, indicate that producers in areas of the western and central belt are willing to part with a portion of their production at present levels, particularly as the basis on certain qualities appears to justify such action. At the same time, hedges are by no means heavy, and in case the volume of selling should force contracts to lower levels, we believe this will serve only to accelerate the movement of cotton into the loan.

Sooner or later, therefore, it seems reasonable to expect progressive tightening in the supply situation, with relief dependent on the extent of the upturn and the willingness of the remaining producers to part with their holdings.

Although weather recently, with the exception of heavy rains along the coastal district of the South Atlantic States, has been construed as favourable, our advices from Texas and Oklahoma lead rather strongly to the conviction that while climatic conditions have facilitated picking, the high temperatures have caused further deterioration and diminution in yield prospects. As to the size of the crop, we believe that unless something of a most favourable and unforeseen character develops, the Bureau report of August 8 forecasts the maximum possibilities for the current season.

Export business is disappointing, and at present it is difficult to visualise any market improvement, although more settled world conditions may bring this about. On the other hand, we recently have seen indications of an improvement both in inquiry for and turnover in goods and the domestic outlook is somewhat brighter.

In his issue dated October 7, *Mr. Revere* discusses the prospects of world economic recovery :—

When it comes to gradual, and one might say progressive, price appreciation, we believe it will be necessary to consider an important new factor that has entered

the picture. This is the prospect for world peace and the widespread economic recovery that reasonably may be expected to proceed from it. The subsidence of political unrest should be succeeded by a broader spirit of international amity, taking the form, first, of financial co-operation, later succeeded by a relaxing of trade barriers, exchange restrictions, and banishment of import quotas. World trade for so long has been under the spell of these paralysing devices that the mere freedom from their influence may release constructive forces that could work an almost miraculous change for the better.

It probably would be too much to expect from Washington an immediate, practical recognition of the world change that easily may be in the making. Advances this week indicate that the Administration's cotton policy for the new year will be substantially along the lines of the current season's programme. The production goal is set at about 11,500,000 bales on an acreage between 27,000,000 and 28,000,000. The imposition of quotas is to be determined by a referendum. These represent the main features of what the Secretary of Agriculture recently termed a "middle-of-the-road" policy.

CROP REPORTS

The *American Cotton Crop Service*, Madison, Florida, write as follows under date of October 19, 1938 :—

Continued favourable weather, with temperatures ranging above normal in the North-western Belt, was favourable to late bolls and probably indicates a slight increase in baleage prospects compared with the October 1 Government Estimate. The crop is being rapidly harvested with picking and ginning about completed in the Southern two-thirds of the Belt. The unusually early completion of harvesting in the Southern two-thirds of the Belt can be attributed to favourable weather conditions for the past sixty days and to the absence of a top crop because of weevil activity. Rain is more or less generally needed over the Belt to germinate grain crops recently seeded. Except in the Northern third of the Belt, rainfall would not handicap harvesting. It is apparent that the date of killing frost will not decrease the crop in the North-western Belt. Our crop reporters state that growers are taking home relatively small amounts of planting seed for use in 1939. In Madison County, Florida, where cotton acreage was formally about equally divided between upland and Sea Island types, the trend is distinctly to Sea Island in 1939 because Sea Island does not come under the acreage allotment laws.

Messrs. Weil Brothers, Montgomery, Alabama, in their Semi-monthly Crop Letter dated October 17, 1938, state as follows :—

The weather throughout the Belt has been uniformly and exceptionally favourable for the gathering of the crop. Practically no rain. Picking and ginning have made unusual progress this season. In the extreme Northern sections of the Belt 90 to 95 per cent. is open and in the Central and Southern parts of the Belt our correspondents report 100 per cent. is open and largely picked. Thus the outstanding features of this crop are : Early maturity, promptly picked and equally as promptly ginned. The marketing of this crop presents quite another picture.

The holding movement, while general, is more pronounced than for several seasons, and is more in one locality than in another. Thus far the selling movement has been orderly throughout the season—to a large extent predicated on the fact that farmers can put their cotton in the loan at any time and realise 8.30 cent basis Middling $\frac{1}{8}$ in. The farmers selling compare the loan price with what they can get in the open market—staple premiums playing an exceptional role, for instance in North and South Carolina.

The crop of 1938-39 will go down in history as a high grade crop—exceptionally white and bright and what is more with unusually good staple and character and consequently good spinning quality.

On December 10, cotton farmers will decide by vote whether they will continue under the Government next year as to acreage control, cotton production and marketing. A two-thirds vote is necessary.

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*The Minister of Agriculture of Egypt and the President of the International Cotton Federation
are ex-officio members.*

General Secretary : N. S. PEARSE.

Hon. Secretary : JOHN POGSON, J.P.



EGYPTIAN COTTON

H.E. HUSSEIN ENAN BEY

It was with great pleasure that we learned recently of the appointment of H.E. Hussein Enan Bey, for many years Secretary-General to the Egyptian Ministry of Agriculture, to the position of Under-Secretary of State for Agriculture in the Egyptian Government. On behalf of all the members of the International Cotton Federation we extend to His Excellency our heartiest congratulations upon his well-merited promotion in the firm belief that he will continue to play as active a part in the important activities of the Joint Egyptian Cotton Committee in the future as he has done in the past. His Excellency has been a member of this committee since its inception in 1928, and in all his multitudinous activities connected therewith has fully earned the confidence of the spinners, the exporters and his own Government officials alike.

NEW APPOINTMENT ON THE JOINT EGYPTIAN COTTON COMMITTEE

The Head Office of the International Cotton Federation has been informed that H.E. Amin Osman Pasha, Under-Secretary of State for Finance in the Egyptian Government has been appointed as member of the Egyptian Section of the Joint Egyptian Cotton Committee to fill the vacancy created by the death of H.E. the late Ahmed Abdel Wahab Pasha. The members of the International Cotton Federation and particularly the European Spinner Section of the Joint Egyptian Cotton Committee heartily congratulate His Excellency upon his appointment and wish him a successful and distinguished tenure of office.

GOVERNMENT'S FIRST ESTIMATE, 1938/1939

The Egyptian Ministry of Agriculture's first estimate of the Cotton Crop for 1938-39 (in cantars) resulted as follows :—

		1938-39		1937-38		1936-37	
		First Estimate	Final Estimate	First Estimate	Final Estimate	First Estimate	Final Estimate
Cotton over 1½" Staple	{ Sakel	301,000	552,000	557,981	561,000	520,052	
	{ Others	2,515,000	3,069,000	3,001,982	2,499,000	2,335,641	
Cotton over 1½" Staple		200,000	153,000	156,637	182,000	146,598	
Cotton over 1½" Staple		4,675,000	7,149,000	7,089,569	5,942,000	5,901,080	
Total	.. ..	6,791,000	10,923,000	10,816,169	9,184,000	8,903,371	
Scarto	.. ..	160,000	218,000	192,693	214,000	203,818	
Total including Scarto		7,851,000	11,141,000	11,008,862	9,398,000	9,107,189	

GOVERNMENT GINNING REPORT

The Egyptian Ministry of Agriculture announced recently that the total amount of cotton ginned in Egypt from the commencement of the new season (Sept. 1, 1938) to the end of September, 1938, is as follows :—

Sakellaridis	.. ..	389	Cantars
Other long staple varieties	.. ..	106,671	„
Medium-long staple varieties	.. ..	10,713	„
Medium staple varieties	.. ..	886,307	„
Scarto	.. ..	12,183	„
Total	.. ..	1,016,263	„

ALEXANDRIA CARRYOVER, AUG. 31, 1938

The Ministry of Finance have published detailed, certified figures concerning the carryover in Alexandria on August 31, 1938. Similar figures for the three previous seasons are also given.

	1938	1937	1936	1935
	Cantars	Cantars	Cantars	Cantars
Sakellaridis	260,721.70	55,384.84	110,275.77	167,986.83
Ashmouni	424,741.14	127,777.25	117,292.28	95,632.93
Zagora	322,876.40	23,635.45	52,427.00	
Pillion	—	—	430.24	3,995.78
Maarad	81,155.00	7,848.34	47,429.19	16,034.56
Nahda	—	—	2,361.72	7,792.80
Fouadi	20,881.11	1,912.04	13,184.15	4,966.58
Giza 3	3,973.74	4,032.22	2,061.56	5,019.19
Giza 7	303,420.71	22,482.29	36,099.47	34,317.58
Giza 12	25,782.23	3,403.24	—	—
Giza 26	141.49	—	—	—
Casulli and White	368.23	100.92	585.36	1,124.24
Sakha 4	28,685.66	43,063.14	29,533.65	10,904.41
Other kinds	10,959.23	22,007.52	46,857.31	20,357.91
Sekkina	31,831.06	39,370.76	23,444.14	4,902.71
Afrita	2,307.28	436.77	6,906.31	3,436.44
Mixed	4,578.74	—	—	—
Low	3,411.84	—	—	—
Total	1,525,835.56	351,454.78	488,888.15	376,471.06

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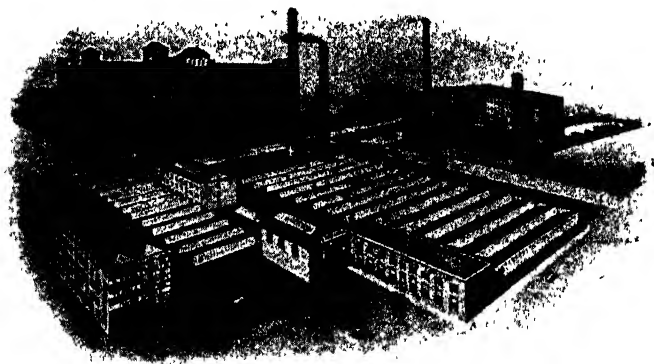
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A STEP IN THE RIGHT DIRECTION

The photograph below shows cotton pickers on the Egyptian Royal Agricultural Society's Estate at Bahtim clothed in white cotton clothing. This innovation is in response to a resolution of the Joint Egyptian Cotton Committee asking that all cotton pickers and operatives in cotton ginneries and presses in Egypt, should be so clothed with the object of eliminating small pieces of coloured cotton cloth and threads from the raw cotton.



Cotton Pickers in Egypt.

The Royal Agricultural Society is to be congratulated upon taking the lead in an endeavour to solve this problem. It is hoped that the Egyptian ginners will follow the Society's example in providing similar clothing for the operatives in the ginneries where most of the admixture of coloured material takes place.

CULTIVATION OF BAHTIM COTTON

According to the *Egyptian Gazette* the Administrative Council of the Royal Agricultural Society has suggested to the Minister of Agriculture that the new white cotton known as "Bahtim" should be included in the list of the varieties of cotton permitted to be grown in Egypt, claiming that it is equal in quality to Giza 7. The suggestion is still under consideration.

EXPORTS OF COTTON

1st SEPTEMBER, 1937,

Total	Exporters	England	France	German	Japan	Spain	Italy	India	Czecho-Slovakia
86,950	Peel & Co. Ltd.	23,716	7,731	16,676	8,514	380	4,296	2,230	4,101
76,117	Ahmed A. Farghaly Bey	19,499	5,986	17,779	375	—	3,592	6,338	208
63,570	Alexandria Commercial Cy. . . .	30,501	2,948	5,855	3,237	—	5,259	692	2,975
60,610	Pinto & Co.	19,948	6,862	2,262	1,250	—	8,929	5,731	1,734
60,418	Anderson, Clayton & Co.	10,571	5,335	4,818	150	115	12,194	6,611	1,194
60,211	Lévy Rossano & Co.	20,965	11,868	—	200	—	3,438	16,740	1,594
55,398	Cicurel & Co.	19,624	12,197	2,473	2,500	—	280	3,949	746
53,869	Carver Bros. & Co. Ltd.	9,923	5,198	7,218	200	—	10,059	8,288	2,060
49,759	Salvago C. M. & Co.	17,251	11,120	3,092	1,400	—	645	456	5,180
49,094	Choremi Benachi Cotton Cy. . . .	9,298	5,052	2,068	1,950	—	2,342	3,570	6,034
46,578	Eg. Produce Trading Cy. S.A. . . .	25,854	6,510	3,296	4,595	—	2,733	30	402
44,588	Soc. Mistr pr. l'Ex. du Coton (ex Landemann)	1,362	4,738	10,994	650	—	1,130	1,175	1,802
39,991	Reinhart & Co.	1,359	11,621	4,816	9,254	—	991	5,295	479
36,005	Rodocanachi & Co.	20,148	5,888	2,584	4,070	—	1,250	378	185
35,410	Planta, J. & Co.	7,456	2,297	4,935	600	—	5,446	80	4,059
33,855	Kupper, H.	1,433	3,671	5,069	8,577	—	3,297	255	107
28,417	Escher, W.	418	214	22,406	—	—	436	—	1,287
27,381	Fendler & Co.	5,610	1,865	5,004	1,150	—	2,689	100	1,548
26,089	Alexandria Cotton Trad. Cy. . . .	11,203	3,150	2,901	—	—	1,900	2,575	616
21,381	Union Cotton Cy. of Alexandria . .	7,769	9,042	1,102	650	—	2,274	107	—
21,057	Société Cotonnière d'Egypte . . .	10,811	1,973	1,526	—	—	—	26	2,836
17,908	British Egyptian Cotton Cy. Ltd. .	9,630	1,979	500	600	375	1,520	625	525
17,408	Rolo, J., & Co.	6,791	7,523	—	—	—	300	230	—
15,911	Casulli, M. S., & Co.	7,769	822	981	—	—	500	735	198
15,544	Sakellarios & Co.	11,747	1,037	259	—	—	546	200	342
15,101	Japan Cotton Trading Cy. Ltd. . .	—	—	—	14,601	—	—	—	—
15,030	Anglo-Continental Cotton Cy. . .	7,556	1,876	—	—	—	—	2,178	—
14,229	Joakimglou, C. Z., & Co.	7,560	1,144	779	100	—	683	2,458	128
12,483	Getty, W., & Co.	464	661	3,251	—	—	732	2,045	498
11,018	Aghon, Riquez & Co.	4,164	4,441	387	1,000	—	894	—	—
10,326	Eastern Export Cy. S.A.	8,140	531	455	—	—	50	35	605
9,737	Elia Bondi	9,337	—	—	—	—	—	—	—
9,600	Eg. Cotton Ginners & Exporters . .	3,062	361	3,214	401	—	—	1,438	—
9,493	Comptoir Cotonnier d'Egypte . .	5,331	3,962	—	—	—	—	—	—
8,005	Francis Lévy & Co.	3,336	1,233	—	—	—	—	3,436	—
7,680	Daniel Pasquonelli & Co	3,216	1,014	—	—	—	—	1,954	227
7,217	Delta Cotton Cy. (Doumani & Co) .	—	10	15	352	—	—	6,310	—
6,246	Engel Adrien & Co.	1,645	1,260	81	—	—	654	—	—
6,117	Cottonnière d'Alex. (Pierre Grandguillot & Co) . . .	4,851	670	24	—	—	25	—	—
4,721	Ela, D. & A., & Co.	4,646	—	—	—	—	—	—	—
4,371	Bibace & Co.	2,314	440	—	—	—	—	1,177	—
4,217	Riches, Stabile & Co.	2,761	130	107	—	—	994	—	225
3,248	Cambas, P., & Co.	1,497	1,064	497	—	—	—	—	—
3,166	Yazgi, A. & W.	1,079	1,063	—	—	—	—	—	—
1,850	Camilleri, Hector E., & Co. . . .	1,324	400	—	—	—	100	25	1
397	Lumbroso, M., & Co.	397	—	—	—	—	—	—	—
274	Sellas, André, & Co.	162	—	78	—	—	—	—	—
2,111	Sundries	1,299	—	310	—	—	13	—	—
1,210,156	Total	384,806	156,787	147,674	66,976	870	80,191	87,372	41,904
	Against 1936/37	405,072	140,855	92,323	132,909	55	78,054	61,464	48,130

Total 1,210,156 Bales weighing nett Cantars 8,917,781.

Against season : 1936/37 1,201 810 Bales weighing nett Cantars 8,824,204.

DURING SEASON 1937-1938.

to 31st AUGUST, 1938

Switzerland	U.S. of America	Poland	Roumania	China	Austria	Hungary	Belgium	Sweden	Canada	Portugal	Estonia	Yugoslavia	Greece, Syria, and Turkey	Holland	Bulgaria	Sundries
2,473	3,209	90	4,000	650	2,241	520	653	1,525	—	2,076	—	—	—	1,477	—	392
2,329	4,142	5,100	6,735	—	1,048	146	547	1,099	200	405	25	75	13	30	80	375
1,280	5,035	463	700	1,100	2,333	120	5	150	—	100	100	135	—	132	90	60
1,800	110	3,595	3,735	—	—	216	3,176	—	50	—	280	—	740	81	111	—
1,635	3,637	3,580	2,818	200	390	1,330	—	—	850	275	4,285	—	—	326	50	54
471	431	136	2,615	—	216	262	618	50	415	70	—	36	20	—	66	—
960	500	1,580	3,251	—	—	1,874	2,006	610	800	210	—	220	—	444	60	1,115
1,578	2,753	3,510	138	200	595	100	6	264	100	750	785	—	—	50	70	15
780	—	690	1,267	—	284	282	126	530	—	15	200	4,738	1,268	—	—	435
11,132	402	100	60	—	4,213	—	967	—	300	165	—	—	—	541	—	—
—	885	30	600	—	—	150	627	461	5	—	—	400	—	—	—	—
120	665	180	8,328	—	1,462	2,450	60	—	—	—	65	—	31	342	34	—
2,982	220	1,080	799	500	90	405	110	—	—	—	25	—	—	—	45	20
62	—	—	—	—	60	—	—	100	—	—	—	—	180	—	—	500
4,556	—	570	2,305	—	2,846	—	10	—	—	—	—	30	—	220	—	—
7,420	104	1,824	250	1,100	60	240	193	—	—	—	—	—	—	202	—	53
1,110	—	390	2,126	—	—	—	30	—	—	—	—	—	—	—	—	—
2,147	1,423	2,890	1,140	—	365	—	1,140	—	—	150	—	—	60	—	100	—
210	372	1,460	100	—	279	40	450	610	—	—	66	—	55	30	—	72
60	—	—	—	—	—	—	175	—	—	20	—	—	—	182	—	—
810	100	315	—	—	252	612	—	—	—	1,228	—	—	492	—	76	—
90	700	50	175	—	130	—	30	610	400	—	—	—	—	60	—	—
390	202	—	200	—	—	1,212	—	—	200	—	—	—	—	50	—	250
3,626	300	—	50	—	50	100	—	—	—	50	—	—	730	—	—	—
156	—	120	100	—	—	—	—	50	—	30	—	—	821	—	136	—
—	—	—	—	500	—	—	—	—	—	—	—	—	—	—	—	—
100	500	200	150	—	270	—	—	2,100	—	100	—	—	—	—	—	—
—	—	—	70	—	—	793	—	—	—	—	—	144	270	100	—	—
2,688	345	540	1,100	—	—	—	—	—	105	—	—	—	—	30	60	—
—	—	132	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	450	—	—	—	—	50	—	—	—	—	—	—	10	—
—	200	50	—	—	—	—	—	—	—	150	—	—	—	—	—	—
—	—	—	803	—	—	—	—	—	—	20	—	—	61	—	247	—
—	—	—	—	—	—	—	—	200	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	150	—	—	—	—	—	594	250	—	—	—	—	—	—	—	275
—	—	—	—	—	—	—	—	—	—	—	—	—	25	—	—	505
—	—	180	2,201	—	—	195	—	—	—	30	—	—	—	—	—	—
397	—	100	—	—	50	—	—	—	—	—	—	—	—	—	—	—
—	75	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	140	—	—	300	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	190	—	—	—
258	—	—	400	—	—	—	366	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	36	—	—	—	—	—	—	—	—	—	—	—	—	—
30	—	—	—	—	—	—	100	—	—	320	—	—	5	30	—	4
51,650	26,520	28,955	46,702	4,550	17,234	11,047	12,129	8,650	3,425	6,464	5,831	5,778	4,961	4,327	1,228	4,125
48,670	38,801	21,267	39,653	16,240	15,896	10,436	15,347	8,627	3,370	3,860	4,165	5,313	4,007	4,310	668	2,318

EGYPTIAN COTTON

Exports of Egyptian Cotton, by Countries and Varieties, Seasons 1938 and 1937.

(Quantities expressed in bales — 1 bale = 7.35 cantars)

Countries of Destination	TOTAL EXPORTS FOR THE SEASON 1937/38 COMPARED TO THE SEASON 1936/37													
	SAKELLARIDIS 1938	1937	ASHMOUNT 1938	1937	ZAGORA 1938	1937	GIZA 7 1938	1937	MAARAD 1938	1937	FOUADI 1938	1937	SAKHA 4 1938	OTHER KINDS 1937
England ..	7,900	27,506	195,928	178,416	68,407	74,771	94,513	99,662	3,158	5,131	532	3,296	4,971	4,816
British India ..	1,126	3,216	20,847	12,199	3,437	3,334	54,522	34,198	4,726	2,367	300	1,427	1,343	9,422
Austria ..	66	90	1,608	2,225	11,187	9,916	4,025	2,500	72	36	339	902	9	1,508
Belgium ..	50	100	4,860	6,747	4,030	4,443	1,702	1,815	—	20	—	—	—	—
Canada ..	—	—	1,750	1,400	5	—	1,675	1,420	200	600	—	—	—	1,411
China ..	—	950	3,575	11,840	—	550	1,050	2,385	—	150	—	—	—	15
Czecho-Slovakia ..	1,281	3,851	8,722	12,851	15,624	15,426	11,456	13,504	3,417	3,527	36	72	734	614
Estonia ..	—	45	4,826	3,535	661	435	175	60	—	—	—	—	—	380
France ..	12,449	8,508	70,782	63,675	41,124	37,699	25,934	21,803	3,024	2,947	998	1,410	968	444
Germany ..	2,948	5,536	67,881	35,381	23,455	17,417	41,767	25,380	2,532	836	575	1,282	7,560	4,732
Greece ..	12	—	3,730	2,796	917	774	56	35	—	—	140	—	—	2
Holland ..	—	—	404	334	2,343	1,914	1,567	984	95	61	—	—	—	193
Hungary ..	—	—	3,770	3,764	5,644	5,870	1,171	435	—	—	70	40	60	—
Italy ..	10,819	10,516	46,016	46,201	12,763	12,187	8,491	3,698	688	440	—	158	1,481	299
Japan ..	3,658	5,399	33,775	57,842	13,445	42,245	7,696	10,093	6,875	15,340	468	1,980	459	1,129
Poland ..	60	30	5,948	6,155	15,047	10,147	3,865	2,360	3,815	2,159	—	60	536	425
Portugal ..	1,150	1,740	2,057	380	981	919	1,144	382	585	355	20	35	662	60
Roumania ..	160	*	12,867	*	33,260	*	148	*	—	—	—	—	—	180
Spain ..	—	—	870	55	—	—	—	—	—	—	—	—	—	230
Sweden ..	—	—	2,675	1,843	5,350	5,928	433	470	—	—	—	—	—	*
Switzerland ..	3	—	17,596	15,970	10,826	13,841	9,107	6,532	8,692	6,290	456	750	127	91
U.S.A. ..	202	3,709	974	2,632	35	—	17,902	25,766	2,327	4,324	—	—	4,986	62
Other Countries ..	240	338	636	13,154	7,993	32,437	1,280	1,386	515	313	277	24	195	1,031
Total ..	45,692	75,501	512,087	479,395	276,534	290,253	289,679	254,868	40,721	44,896	4,304	11,639	23,741	19,790
														17,487
														25,385

* Figures of Roumania for 1937 were included in "Other Countries."

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1938/1939 CROP PROSPECTS

Résumé of information received during September, 1938, by the Cotton Committee of the *Commission de la Bourse de Minet-el-Bassal*.

LOWER EGYPT.—The temperature during the first half of September was normal. But it then became cool, and damp nights and foggy mornings checked the development and opening of the bolls, which in many districts dried up.

Leaf worm practically disappeared. There were fresh attacks of pink worm and boll worm ; moreover, damage was caused by "Nadwa Assalia."

The number of bolls damaged varies according to district from 20 to 40 per cent. In the extreme North of the Delta the percentage reached 50 to 60 per cent.

First picking, which is 15 to 20 days late has become general throughout the Delta. The yield per feddan is 15 to 35 per cent. smaller than last season according to district. Second pickings will be of little importance.

The ginning out-turn is 2 to 4 per cent. smaller than last year.

Infiltration due to the high Nile has caused some damage in the plantations bordering the river.

UPPER EGYPT AND FAYOUM.—The temperature during September was rather cool and not favourable to the opening of the bolls.

There were some attacks of pink worm and boll worm, and damage was caused by "Nadwa Assalia."

The number of bolls damaged by worm is larger than last year.

Picking which is fifteen days late is general. The yield per feddan is from 15 to 25 per cent. smaller than last year.

The ginning out-turn is rather smaller than last year.

In consequence of the high Nile, flooding of the basin lands was premature and many cultivators were unable to finish picking. It is estimated that the resulting damage is fairly extensive.

The following summary was issued recently by the *Alexandria Commercial Co. S.A.* :—

UPPER EGYPT.—Although on the whole sowing was early, germination was retarded owing to bad weather. Much re-sowing had to be done and this caused the crop to be delayed by at least 15 to 20 days.

This delay caused a reduction in the yield following the warmth of July and August, a period during which some days of great heat were experienced. This heat affected a greater number of bolls than usual. The regions South of Assiut suffered much more than those North of Assiut.

Moreover, a proportion of the Upper Egypt crop has been lost following the early opening of the basins. The exact amount, however, is difficult to estimate.

In general, this year, Upper Egypt can be divided into two zones : that South of Assiut, which is the most affected, and where the yield will be considerably less than last year owing to the forced abandonment of the second picking or the bad yield therefrom ; and that from Assiut to Cairo, which is relatively better, but where also the yields will be less than last year.

LOWER EGYPT.—The same conditions retarded the Lower Egypt crop, but the delay was even more pronounced, especially in the northern districts. The progress of the crop was then affected by the leaf-worm attack, which prevented the initial delay from being made good and later exposed the crop to the pink boll-worm attack. Boll opening was poor. Picking in the early fields is commencing and will become general during the next ten days, but the actual results up to now foretell an appreciable decrease in the yield per feddan from that of last year.

CONCLUSION.—In conclusion we estimate the yields per feddan this year as follows :—

Upper Egypt : (a) South of Assiut 20% to 25% inferior to those of last year ; (b) North of Assiut about 10% inferior to those of last year.

Lower Egypt : (a) Regions situated to the South and in the Centre of the Delta, yields about 10% inferior to those of 1937 ; (b) Regions situated to the North of the Delta, yields from 30% to 40% inferior to those of 1937.

MARKET REPORTS

The Egyptian Produce Trading Cy. S.A.E., of Alexandria, write as follows under date of October 13 :—

SPOT MARKET.—This market was quite active during this fortnight.

In SAKEL although a certain interest was shown for cheap lots which are being sold at "prix de sacrifice" it should be reported that business on the whole is still reduced. FGF can be had currently at 50 points off contract ; in certain cases at 75 off. Such cottons are probably untenderable and yet they weigh on the market. High grades Sakel will naturally be scarce, as the high grades of all varieties. We earnestly believe that their bases will tend to harden as and when we advance into the season.

Demand for MAARAD is moderate and is chiefly directed on high grades. In our opinion they are being offered today at very reasonable prices. New-crop medium-grades have not yet arrived on the market.

GIZA 7 high-grades have undergone extraordinary appreciation. Their basis has risen by some 40 to 50 dollar points during this fortnight. They are called upon to appreciate still further in view of the strong demand for them and their smaller percentage this year in relation to the preceding year. To our friends who have a major interest in such cottons we would ask you to advise them that not only will the basis harden continually up to the end of the season but that at a not too distant date it may be feared that choice cottons might be deficient at the very moment when they will decide to be on the market for them.

Medium-grades are likewise equally sought after, but on account of the lateness of the crop they cannot be found in commercial quantities.

Demand for ASHMOUNI is evenly directed and premiums are firmly maintained. The scarcity of high-grades is equally a feature of this variety but it is less pronounced than with Giza 7.

ZAGORA was in demand and bases were in slight advance.
NEW CROP.

The bad news in regard to the crop is largely responsible for our market's strength during this fortnight. The hopes entertained before the second picking for a fairly sized crop have been deceived. The general impression is that figures in respect of all varieties should be reduced from the original crop estimates. Deceptions were mostly met in connection with Giza 7, several cultivators of which will only reap this year not more than one-half of what they reaped last year.

Whereas the Government's estimate of the Giza 7 crop amounts to Crs. 2,060,000 general opinion is that this year's crop can hardly exceed Crs. 1,700,000 and possibly less. The opinion of the most experienced agricultural technologists is that rarely have we had in Lower Egypt and more particularly in the North Delta such a bad crop.

Many estimates range around Crs. 7,000,000 to Crs. 7,200,000 while several others go below Crs. 7,000,000.

Messrs. Reinhart & Co., Alexandria, state in their weekly report dated October 21, 1938 :—

SPOT MARKET.—There exists a good demand for Ashmouni and Giza 7. Premiums of these varieties have remained practically unchanged, except those of the top grades which have advanced somewhat. Arrivals of Sakellaridis, Maarad, Sakha 4 are easily absorbed. The existing demand cannot fully be met with. Premiums of these varieties have considerably advanced of late, and a further stiffening of premiums, especially of the higher grades, seems well possible in view of the abnormally small crop. Total sales for the week have been returned with 17,475 bales of which 5,958 bales Ashmouni, 5,503 bales Giza 7, 2,563 bales Zagora, 1,374 bales Maarad, 1,344 bales Sakellaridis and 733 bales of other varieties.

The first lots of Domains Giza 26 have been sold at a public auction this week. Buyers were extremely keen and very full prices were obtained by the State Domains.

INTERIOR.—Cultivators are reluctant in selling their cotton which in many cases does not cover the actual expenditure incurred for raising the crop. Very high prices, exceeding those actually obtained on the spot market by about $\$ \frac{1}{2}$, are

asked for well known crops and freely paid by merchants who expect a further advance of spot premiums.

The following report was issued this week by the Ministry of Agriculture covering the first fortnight of October :—

"The temperature during this period was unfavourable to the ripening and opening of the bolls remaining on the cotton plants. There are, however, few late bolls, as most of them have dried out or got rotten.

"Attacks by the two boll worms have been heavy in comparison with last year. They exceed those of last year by 12% for Giza 7 and Sakellaridis and by 6% for Zagora.

"Picking in Upper Egypt and in the South of the Delta has come to an end, except in some fields where the second picking takes place. In the Northern Delta the proportion of cotton picked amounts to 75% for the first picking and to 40% for the second picking."

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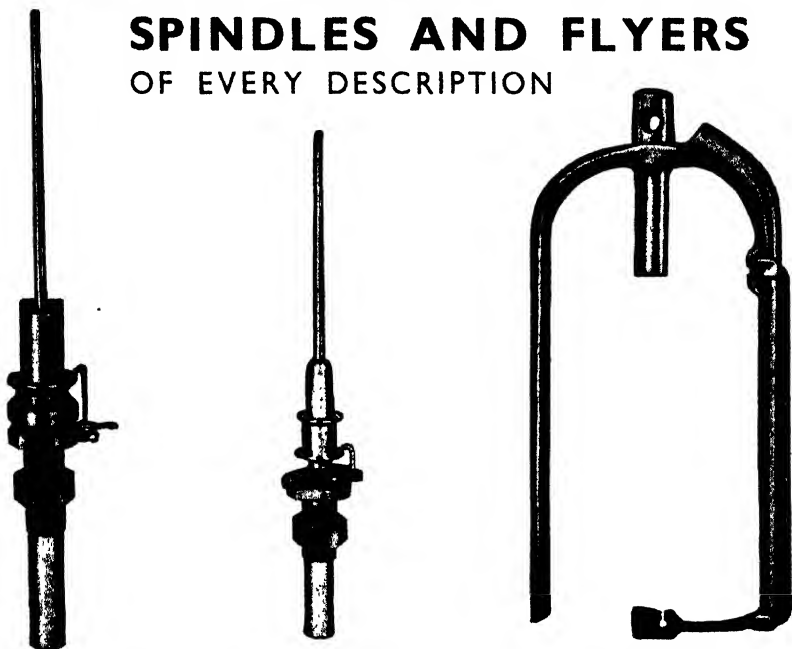
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East Indian Cotton



FIRST COTTON FORECAST, 1938-39

This forecast, issued by the Government of India, is based upon reports on the condition of the cotton crop at the end of July or early August. The reports do not, as will be seen from the detailed notes below, relate to the entire cotton area of India but to 79 per cent. of the total.

The area sown is at present estimated at 15,763,000 acres, as compared with 15,242,000 acres (revised) at the corresponding time of last year, or an increase of 3 per cent.

Weather conditions at sowing time were not quite favourable, and the present condition of the crop, on the whole, is reported to be fairly good.

Detailed figures for the provinces and States are as follows :—

Provinces and States	Acres (Thousands)		
	1938-39	1937-38	1936-37
Bombay-Deccan (including Indian States) ..	1,427	1,414	1,302
Central Provinces and Berar	3,922	4,013	4,099
Punjab (including Indian States)	3,702	3,575	3,305
Madras	284	227	286
United Provinces (including Rampur State) ..	560	673	575
Sind (including Khairpur State)	958	953	855
Bengal (including Tripura State)	87	(a) 93	(a) 93
Bihar	43	30	31
Assam	44	43	37
Ajmer-Merwara	15	(a) 14	15
North-West Frontier Province	21	21	17
Orissa	7	7	7
Delhi	1	2	2
Hyderabad	1,635	1,381	1,485
Central India	1,258	1,429	1,271
Baroda	762	316	833
Gwalior	641	571	608
Rajputana	388	(a) 468	441
Mysore	8	12	16
Total	15,763	(a) 15,242	(a) 15,278

(a) Revised.

A statement showing the present estimates of area classified according to the recognised trade descriptions of cotton is given below :—

Descriptions of Cotton				Acres (Thousands)	
				1938-39	1937-38
Oomras :					
Khandesh	..	..	..	1,261	1,267
Central India	..	..	..	1,899	2,000
Barsi and Nagar	..	..	..	1,045	873
Hyderabad-Gaorani	..	..	..	669	628
Berar	..	..	..	2,748	2,757
Central Provinces	..	..	..	1,174	1,256
Total				8,796	8,781
Dholleras				224†	83
Bengal-Sind :					
United Provinces	..	..	..	560	673
Rajputana	..	..	..	403	482*
Sind-Punjab	..	..	..	2,361	2,291
Others	..	..	..	55	42
Total				3,385	3,488*
American :					
Punjab	..	..	..	1,703	1,649
Sind	..	..	..	612	611
Total				2,315	2,260
Broach	..	..	..	538†	233
Coompta-Dharwar	..	..	..	17	19
Westerns and Northerns	..	..	..	197	53
Cocanadas	..	..	..	21	24
Tinnevellies	..	..	..	137	162
Salems	..	..	..
Cambodias	..	..	..
Comillas and other sorts	..	..	..	133	139*
Grand Total				15,763	15,242*

* Revised.

† The figures shown against " Dholleras " and " Broach " varieties refer to the crop grown in the Baroda State only. The comparative increase is due to sowings in the State not having been completed last year at the time of report as a result of continued heavy rain in July.

The area sown with cotton in Burma during the current year is estimated at 549,000 acres, as compared with 563,000 acres, the actual area under the crop in 1937-38. The condition of the crop is reported to be generally fair.

The second estimate of the area covered by the 1938-39 cotton crop in India, issued on October 19 by the Department of Commercial Intelligence and Statistics, is 21,492,000 acres. This total includes 9,935,000 acres of the Oomra variety, 3,594,000 acres of Bengal-Sind, 1,748,000 acres of Dholleras, 1,374,000 acres of Broach, 2,385,000 acres of American, and 2,456,000 acres of other varieties. The total acreage represents an increase of 4 per cent. compared with the corresponding revised forecast for last year. The first estimate showed an increase of 3 per cent. as compared with the corresponding figure a year previously.

SUITABILITY OF TWO COTTONS FOR PURPOSES OF MILL MIXINGS IN RELATION TO THEIR FIBRE CHARACTERS

A detailed investigation was undertaken by Dr. Nazir Ahmad and Dr. K. R. Sen, of the Indian Central Cotton Committee Technological Laboratory, Bombay, in order to study the relative importance of fibre-properties in determining the suitability of two cottons for purposes of mixings. For this purpose, 5 superior types, viz. (1) Surat 1027 A.L.F., (2) Jayawant, (3) P.A. 289F, (4) Cambodia Co.2 and (5) Kampala were spun pure. Each of these was then mixed with 25 per cent. and 50 per cent. of the four inferior types, namely, (1) P.A. 4F, (2) Wagad, (3) Broach Palej and (4) Raman (Punjab-desi) and the mixtures were spun on 3-roller and 4-roller systems of spinning into suitable counts. All the cottons were examined for a large number of fibre-properties and the yarns obtained from the pure cottons and the mixtures were tested for strength, evenness, etc. The following conclusions are drawn from the results of this investigation :—

(1) *Waste Losses.*—If a dirty cotton is used as one of the components it would push up the blow-room loss and consequently the total waste loss of the mixture. High proportion of short fibres in one of the components of a mixture is conducive to high aggregate wastiness.

(2) *Yarn Neppiness.*—In the case of these mixtures yarn neppiness is found to behave as an additive property, the degree of neppiness of the yarns spun from a mixture depending upon the neppiness of its components. Furthermore, the presence of a certain amount of short-stapled cotton, provided it is free from neps, has the effect of reducing the degree of neppiness of yarns spun from a mixture, which is especially noticeable in cases where the superior cotton happens to suffer seriously from this defect.

(3) *Yarn Evenness.*—With medium long varieties as the basic cottons, if the mixture is spun into a count lying well within its spinning capacity, the presence of the inferior cotton up to 25 per cent. does not bring about such a reduction in the evenness of the yarns as is perceptible to the eye,

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but if the mixture is spun into a higher count the effect of the inferior cotton in reducing the evenness of the yarns becomes noticeable. With long cottons such as Kampala as the basis, the effect of the inferior variety in lowering yarn evenness becomes noticeable even in counts which lie well within the spinning performance of the mixture.

(4) *Yarn Strength.*—For purposes of determining the suitability of cottons for mixing purposes, the individual performance of the components is a useful but not a sufficient guide as the performance of the mixture depends on the differences in the fibre-characters of its components.

25 per cent. Mixtures.—

(i) The disadvantage of low staple length of the inferior cotton in a mixture may, to a large extent, be overcome by choosing a cotton which differs less radically from the superior cotton in respect of ribbon-width, fibre-weight and especially clinging power. Even the wax content of the inferior cotton may be less, giving it a harsh feel. This conclusion should be of special interest to the mills, as the cottons are primarily bought on the basis of length and feel. It shows that by determining the mean fibre-weight and clinging power of their cottons the mills can obtain valuable information regarding the probable performance of their mixings and thereby effect savings in initial costs.

(ii) An increase in the ribbon-width and clinging power and a decrease in the wax content of the superior cotton have an adverse effect on the yarn-strength of mixture made from it with a given inferior cotton. This conclusion should also be of importance to the mills as they are apt to ignore such properties as fibre-weight per inch, clinging power and wax content, which are found to have an important bearing on the spinning quality of mixtures.

(iii) Up to a limit of 25 per cent. of the short cotton its effect on the performance of the mixture is small if the superior component possesses fine, waxy and slippery fibres, but this effect becomes appreciable if the fibres of the superior component are coarse and possess high clinging power and low wax content. Thus, two cottons having practically the same staple length and same fibre-diameter, may behave quite differently when each is mixed with a third cotton, the reason for the difference in

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their behaviour lying in the fibre-weight per inch, clinging power and wax content. The relative contribution of each of these three properties on the spinning behaviour can only be ascertained by further work.

(iv) If the inferior cotton selected for a mixture is such that its ribbon-width, mean fibre-weight per inch and wax content lie close to those of the superior cotton, we should expect good results from the mixture. On the other hand, should there be a wide disparity between the two cottons in respect of these properties, the results will not be so good, even though the inferior cotton may have a relatively longer staple and may consequently be bought at a higher price in the market.

(v) These results bring out very clearly the undesirability of mixing cottons indiscriminately outside a mill mixing room. Under such conditions no regard is likely to be paid to their relative fibre-properties, which, as we have seen, determine the suitability or otherwise of two cottons to mix in a satisfactory manner. Thus, a short cotton possessing coarse and sticky fibres may be mixed with another possessing relatively fine and slippery fibres, pulling down its performance by a much greater amount than would be the case with an equally short but fine cotton.

(vi) The results obtained by us show definitely that differences in fibre-weight per inch and ribbon-width of fibres are very important in determining the suitability of two cottons for mixing purposes, and that differences in clinging power should also be regarded as an important auxiliary character, especially for low counts.

50 per cent. Mixtures.—

(i) The extent by which the yarn strength is pulled down varies according to the fibre-properties of the inferior cotton in relation to those of the basic cotton.

(ii) The good effect of low ribbon-width and fibre-weight, which may overcome the adverse effect of short staple in an inferior cotton may not be fully operative if the fibres of the superior cotton possess high fibre-weight per inch and low wax content.

(iii) If the inferior component of a mixture happens to possess very heavy, coarse and sticky fibres as compared with the superior cotton, even the good qualities of the superior cotton would not be able to extract satisfactory results from the mixture.

Effect of additional roller.—

(i) The effect of an additional roller in exerting better fibre-control is, on the whole, less with mixtures containing finer and lighter fibres and greater with mixtures containing the same proportion of cotton possessing relatively high fibre-weight per inch, ribbon-width and clinging power.

(ii) The control of fibres in the 4-roller system increases as the number of fibres in a cross-section of the roving is reduced, but this effect is neutralised if the mixtures contain a large proportion of short and coarse fibres.

The full report of the investigation is contained in Technological Bulletin, Series A, No. 43, obtainable from the Secretary, Indian Central Cotton Committee, Vulcan House, Nicol Road, Ballard Estate, Fort, Bombay. Price 1 Re.

CROP REPORTS

Messrs. Volkart Brothers, Winterthur, Switzerland, stated as follows on October 7, 1938 :—

The position is that we have again to reckon with a bumper crop and in the face of the carryover which is about 600,000 bales bigger than last year, there results a record supply.

However, it is amazing that the situation is not even worse. Considering last year's record crop, which had to compete with 19 million bales in the U.S., in a world daunted by war fear and crisis, it is surprising that the surplus has not been further increased. Once more India got rid of its crop, thanks to the fact that no Government interferes with the cotton trade.

The correction came from the Indian mills this time, benefiting in the first instance from a paralysed Japanese trade. In the same way as the world war has favoured the textile industry of the Far East, India now profits by the Sino/Japanese war. This development is not to be checked. How far it has already gone is shown by the following figures :—

TEXTILE FABRICS IN MILLIONS OF YARDS

	Imports	Exports including re-exports	Surplus of import against exports	Production	Total at disposal of Indian consumption
1914/15 ..	2,446	228	2,218	1,136	3,354
1919/20 ..	1,081	384	697	1,640	2,337
1924/25 ..	1,823	343	1,480	1,970	3,450
1929/30 ..	1,919	330	1,589	2,419	4,008
1935/36 ..	995	287	708	3,571	4,279
1936/37 ..	832	343	489	3,572	4,061

We lay stress on this development in order to show, that prices of Indian cotton are more and more determined by the demand of the native industry and that it is dangerous to anticipate a recurrence of the extraordinarily wide parities of previous years because of a good supply in India.

	1933-34 final	1934-35 final	1935-36 final	1936-37 final	1937-38 final	1938-39 8-9-38
Sind and Punjab Desi ..	1,101,300	943,000	935,000	1,090,000	1,115,000	960,000
Punjab Am. and Sind Am. ..	858,400	809,000	1,355,000	1,510,000	1,315,000	1,465,000
Un. Prov. and Rajputana ..	273,000	309,000	320,000	275,000	360,000	375,000
Oomras ..	1,936,900	1,529,300	1,763,300	2,158,000	1,916,000	1,819,000
Broach and Surti ..	469,250	263,900	581,000	532,000	514,000	450,000
Dholera and Muttra ..	443,850	350,800	588,000	455,000	501,000	381,000
Comptah/Dharwar ..	173,600	132,000	162,000	148,000	149,000	156,000
Coconada and Warrangal ..	41,000	34,200	35,000	53,000	35,000	40,000
Bombay and Madras ..						
Western and Northern ..	246,900	197,700	328,000	217,000	190,000	318,000
Tinnevely and Cambodia ..	345,000	356,500	339,000	385,000	377,000	360,000
Calcutta ..	39,000	48,700	57,000	38,000	47,000	45,000
TOTAL CROP ..	5,928,700	4,973,900	6,466,000	6,861,000	6,422,000	6,369,000
Domestic Consumption ..	750,000	750,000	750,000	750,000	750,000	750,000
Carryover from old season ..	1,072,000	1,411,000	1,051,000	1,105,000	1,118,000	1,700,000
TOTAL SUPPLY ..	7,750,700	7,134,900	8,267,000	8,716,000	8,290,000	8,819,000
Exports to Europe, etc. ..	1,412,900	1,370,300	1,617,000	1,826,000	1,190,000	
Exports to the East ..	2,019,400	1,748,500	2,249,000	2,529,000	982,000	
Indian Mill Takings ..	2,157,400	2,215,100	2,546,000	2,493,000	3,668,000	
Domestic Consumption ..	750,000	750,000	750,000	750,000	750,000	
TOTAL OFFTAKE ..	6,339,700	6,083,900	7,162,000	7,598,000	6,590,000	
Carryover to new season ..	1,411,000	1,051,000	1,105,000	1,118,000	1,700,000	

(Figures for Burma have been deducted in all years.)

EAST INDIAN COTTON

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Messrs. Ralli Bros. Ltd. furnished the following estimates and comments dated October 11 :—

INDIAN COTTON ESTIMATES (in Thousands).

Season : September-August. (Bales of 392 lbs. net.)

	1938-39	1937-38	1936-37	1935-36	1934-35
Crop Movement in India	Pre-	Present	Final	Final	Final
	liminary				
Oomras	2,400	2,210	2,478	2,086	1,980
Bengal/Sind	1,465	1,515	1,387	1,534	1,577
American Surats	1,600	1,350	1,724	1,451	843
Broach/Surti	700	664	700	598	360
Dholerah	550	535	479	464	305
Comptah/Dharwar	225	172	225	185	220
Western/Northern/Dekkan/Carnats	300	242	310	387	293
Coconada	35	38	41	50	45
Tinnivelly/Cambodia	530	498	475	402	400
Comilla styles	60	57	49	56	52
Burmah, etc.	150	126	121	114	110
Receipts (Net yield, plus previous undistributed surplus) ..	8,015*	7,407	7,989	7,327	6,185
Handspindles and Mills' Loose Takings	750	750	750	750	750
	8,765*	8,157	8,739	8,077	6,935
Supplies in India :					
Less previous season's undistributed surplus	1,421	946	966	841	1,204
Yield (gross) : Our estimate ..	7,344	7,211	7,773	7,236	5,731
Government's (with Burmah) ..	?	5,789	6,325	5,938	4,858
Acreage : Our estimate including Burmah	?	26,083	25,219	25,999	24,023
Distribution of above Supplies :					
Europe, etc.	1,150	1,280	1,831	1,645	1,394
Japan	1,000	950	2,567	2,222	1,776
China, etc.	200	156	80	150	50
Indian Mills	3,250	3,600	2,565	2,344	2,124
Indian Mills (loose takings) ..	500	500	467	400	218
Handspindles, etc.	250	250	283	350	532
Total Takings	6,350	6,736	7,793	7,111	6,094
Undistributed Surplus	2,415*	1,421	946	966	841
World Position of Indian Cotton.					
Supplies :—					
Opening Stocks, including Mills' and Transit—					
India	2,700	1,800	1,550	1,400	1,800
Abroad	1,000	1,800	1,650	1,250	1,400
Yield, as above	7,350	7,200	7,750	7,250	5,750
Total Gross Supplies	11,050	10,800	10,950	9,900	8,950
Consumptions :—					
Europe, etc.	1,400	1,400	1,700	1,700	1,200
Japan, China, etc.	1,200	1,600	2,400	1,800	1,900
Cotton Mills—Indian Mills ..	3,500	3,750	2,850	2,750	2,600
Indian Handspindles, etc. ..	250	250	300	350	550
Sundry Consumptions and Losses	100	100	100	100	50
Total Consumption	6,450	7,100	7,350	6,700	6,300
Surplus—Gross	4,600*	3,700	3,600	3,200	2,650
vs Total Consumption	71.3%*	52.1%	49.0%	47.8%	42.1%

The Monsoon started very favourably and continued so until recently. We expressed at various intervals the warning that too much reliance should not be placed on this favourable progress till December. Unfortunately, these misgivings have proved true this season. We have lately had disappointing reports for Bengals and Oomras ; for the latter some exaggerated and somewhat alarming reports were put into circulation.

But after making reductions just received by cable, our figures show that—thanks to the large carryover in India—the prospective receipts for the Oomras appear bigger than last season's and those for the total a high record. Record carryovers of Indian cotton at the end of this season are forecasted.

Receipts have started up-country in a few Bengals, Am. Surat and Oomra markets at prices which are reasonable, although naturally on a higher level than the old crop offerings. With cheaper old crop cotton on the market and provided the new crop movement increases while there is no demand, we may possibly see a somewhat wider parity under Americans ; but this wider parity would doubtless be short-lived, because the prospective percentage surplus of Indian cotton (73.7 per cent.) is so very much smaller than that of American cotton (135.5 per cent.). The present parity seems reasonable.

It should be realised that, with the great and increasing expansion of the spinning industry in India, the cotton markets there are much more independent of values ruling abroad. Indian cotton may at times be dear for abroad, but that matters little if it has a sufficient outlet at home. These remarks apply especially to the better staple varieties of Indian cotton.

It is interesting to notice how much the consumption in the Far East last season exceeded the takings ; this is due to the fact that, foreign exchange being scarce, Japan had to reduce her cotton imports and spin out of stocks ; these have consequently been reduced to a minimum.

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INTERNATIONAL COTTON STATISTICS



The present tabulation is the **FINAL** result of the Census of Cotton Consumption in the Cotton Spinning Mills of the countries making returns for the half-year ended 31st July, 1938, and of Cotton Mill Stocks on that date. It should be borne in mind that the figures published herewith relate to raw cotton only, and do not contain linters or waste cotton of any kind whatsoever. The spindle figures refer to raw cotton spinning spindles only and contain no waste or doubling spindles.

We are pleased to be able to announce that Italian figures, retrospective back to January, 1936, for spindles, consumption and stocks, have come to hand. We have made our tabulations complete in so far as consumption is concerned, from a world point of view, back to July, 1938. We regret that we have again been unable to obtain returns for July, 1938, from China, Russia and Spain. Estimates have been prepared for these countries. No mill stocks figures for Japan have been received to date. Owing to the extreme difficulty in estimating mill stocks, no estimate of mill stocks has been made for Japan, China, or Spain.

Attention is drawn to the figures relating to the consumption and mill stocks of staple fibre (cut rayon) in cotton spinning mills. These figures appear on page 83.

The **total Cotton Mill Consumption for the Year ended 31st July, 1938**, in countries which have furnished returns, compared with that of the same period of the previous year, is as follows :—

	31st July 1938	31st July 1937	Increase or Decrease over same period in 1937
	bales	bales	bales
American Cotton	10,896,000	13,279,000	—2,383,000
East Indian Cotton .. .	5,867,000	6,022,000	— 155,000
Egyptian Cotton	1,188,000	1,273,000	— 85,000
Sundries	8,142,000	9,146,000	—1,004,000
All kinds of Cotton ..	26,093,000	29,720,000	—3,627,000

The total Cotton Mill Stocks on 31st July, 1938 and 1937 in countries reporting, according to continental distribution, were as follows :—

American Cotton :

Europe ..	564,000 bales	against 428,000 bales	on 31st July, 1937.
Asia ..	59,000	" "	329,000 " " " "
America ..	1,283,000	" "	1,304,000 " " " "

The total Mill Stocks of American Cotton on 31st July, 1938, were 1,930,000 bales, as against 2,068,000 bales in the year 1937.

East Indian Cotton :

Europe ..	303,000 bales	against 376,000 bales	on 31st July, 1937.
Asia ..	1,308,000	" "	1,452,000 " " " "

Altogether the Mill Stocks of East Indian Cotton were 1,627,000 bales against 1,850,000 twelve months ago.

Egyptian Cotton :

Europe ..	191,000 bales against 173,000 bales on 31st July, 1937
Asia ..	26,000 " " 55,000 " " " "
America ..	22,000 " " 23,000 " " " "

The total Mill Stocks of Egyptian Cotton were 262,000 bales against 286,000 bales twelve months ago.

Sundry Cottons :

Europe ..	1,023,000 bales against 687,000 bales on 31st July, 1937.
Asia ..	115,000 " " 542,000 " " " "
America ..	202,000 " " 194,000 " " " "

The Total Mill Stocks of all kinds of cotton on July 31st, 1938, in countries reporting, were 5,313,000 bales against 5,785,000 bales on July 31st, 1937.

The World's Total Spindles on July 31st, 1938, showed 147,153,000 as against 147,219,000 in January last.

N. S. PEARSE,
General Secretary.

WORKING HOURS

The hours worked by the firms reporting, when calculated out over the whole industry of each country, indicate the following number of hours worked during the half-year under review. The reader will probably notice that 1,248 hours (*i.e.* six months at 48 hours per week) has been exceeded by many countries. This is, of course, due to the fact that some mills are working two and three shifts and also that, in a few cases, more than 48 hours per week are worked.

	Half-year ending July 31st, 1938	Half-year ending Jan. 31st, 1938
	Average hours worked by the industry.	Average hours worked by the industry.
Great Britain ..	787.28*	1028.38
Germany ..	1274.07	1305.73
France ..	832.66	908.07
Italy ..	No reply	No reply
Czecho-Slovakia ..	835.28	1045.56
Belgium ..	1246.53	1533.62
Poland ..	1560.14	1496.08
Switzerland ..	1184.56	1354.89
Holland ..	1549.14	1620.17
Austria† ..	—	1272.19
Sweden ..	1503.67	1443.51
Portugal ..	1211.35	1257.72
Finland ..	1244.66	1470.92
Hungary ..	1619.67	2474.12
Yugo-Slavia ..	2351.41	2627.82
Denmark ..	1769.83	1304.06
Norway ..	1388.14	1377.27
Japan ..	No reply	Not available
China ..	No reply	Not available
Canada ..	2164.07	2368.79
Mexico ..	1550.29	1408.11
Brazil ..	1258.89	1610.61

U.S.A. In July, 1938, 21,916,000 spindles were active out of a total of 26,376,000 as compared with 22,327,000 active last January.

* Working hours in the American Section averaged 762.05, and those in the Egyptian Section 815.38. Firms owning 203,512 spindles in the American Section and firms owning 192,426 spindles in the Egyptian Section were completely stopped during the six months.

† Included under Germany, July 1938.

TOTAL WORLD

Date	Total Estimated Number of Spinning Spindles existing in world	ESTIMATED MILL STOCKS—In thousands of ACTUAL BALES (000's omitted) "INVISIBLE" SUPPLY					Per 1,000 Spindles Total, all kinds of Cotton
		AMERICAN	EAST INDIAN	EGYPTIAN	SUNDRIES	TOTAL	
Feb. 1, 1938	147,219,000	2,472	1,125	242	1,417	5,256	35.70
" 1937	150,960,000	2,772	1,290	263	1,695	6,020	39.88
" 1936*	153,133,000	2,193	959	268	1,225	4,645	30.33
" 1935*	155,157,000	2,084	1,214	281	1,192	4,771	30.77
" 1934	157,718,000	2,873	1,210	244	941	5,268	33.39
" 1933	158,984,000	2,899	832	208	803	4,542	28.57
" 1932	162,070,000	2,775	984	212	637	4,608	28.43
" 1931	163,571,000	2,427	1,212	202	745	4,586	28.04
" 1930	165,143,000	2,742	1,173	224	792	4,931	29.86
" 1929	165,104,000	2,958	1,216	182	938	5,294	32.06
Mar. 1, 1913	142,186,000	3,448	716	279	973	5,416	38.09
Aug. 1, 1937	149,618,000	2,068	1,850	286	1,581	5,785	37.76
" 1936*	151,745,000	1,554	1,577	239	1,234	4,604	29.45
" 1935*	153,778,000	1,651	1,516	258	1,133	4,558	29.64
" 1934	156,878,000	2,307	1,655	272	1,103	5,337	34.02
" 1933	157,755,000	2,558	1,527	235	730	5,060	32.01
" 1932	161,002,000	2,543	1,031	228	660	4,462	27.71
" 1931	162,278,000	1,871	1,565	217	660	4,313	26.58
" 1930	164,108,000	1,985	1,667	237	609	4,498	27.41
" 1929	164,211,000	2,129	1,761	228	745	4,863	29.61
" 1928	165,103,000	2,112	1,728	170	777	4,787	28.99
Sept. 1, 1913	143,449,000	1,655	1,405	273	744	4,077	28.42

ESTIMATED COTTON MILL CONSUMPTION—In thousands of ACTUAL BALES (000's omitted)

Half-year ending							
Jan. 31, 1938	147,219,000	5755	3168	617	3884	13424	91.38
July 31, 1937	149,618,000	6815	3104	682	4536	15137	101.17
Jan. 31, 1937	150,960,000	6464	2918	591	4610	14583	96.60
July 31, 1936*	151,745,000	6269	2761	516	3605	13151	86.69
Jan. 31, 1936*	153,133,000	5954	2716	551	3623	12844	83.88
July 31, 1935*	153,778,000	5409	2710	563	3519	12201	79.34
Jan. 31, 1935*	155,157,000	5444	2889	521	3363	12217	78.78
July 31, 1934	156,878,000	6513	2403	564	3098	12578	80.18
Jan. 31, 1934	157,718,000	7022	2369	544	2599	12534	79.47
July 31, 1933	157,755,000	7323	2101	472	2514	12470	79.04
Jan. 31, 1933	158,984,000	6847	2059	462	2514	11882	74.74
July 31, 1932	161,002,000	6202	1976	493	2121	10792	67.03
Jan. 31, 1932	162,070,000	6117	2812	487	2114	11530	71.14
July 31, 1931	162,278,000	5630	2850	459	2385	11324	69.75
Jan. 31, 1931	163,571,000	5278	3013	394	2479	11164	68.25
Year ending Aug. 31, 1913	143,449,000	14630	3977	946	3447	23000	160.84

* Consumption and stock figures exclusive of Germany.

Estimated COTTON MILL CONSUMPTION with previous figures for comparison, on basis of Spinners'

COUNTRIES		IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		July 31 1938	Jan. 31 1938	July 31 1937	July 31 1936	July 31 1938	Jan. 31 1938	July 31 1937	July 31 1936
EUROPE :—									
(1) Great Britain ..	..	542	646	641	733	148	231	226	196
(2) ‡Germany ..	..	165	148	134	?	65	68	88	?
(3) France ..	..	308	313	307	357	100	112	117	95
(4) *Russia ..	..	—	—	1	59	—	—	—	—
(5) Italy ..	..	210	197	203	201	29	45	47	26
(6) Czecho-Slovakia ..	..	105	108	127	131	15	33	39	30
(7) Belgium ..	..	73	79	77	74	56	88	95	62
(8) *Spain ..	..	1	—	?	79	?	—	?	16
(9) Poland ..	..	83	89	85	108	7	4	4	3
(10) Switzerland ..	..	12	16	16	14	4	7	8	5
(11) Holland ..	..	53	55	55	42	23	25	27	22
(12) ‡Austria ..	..	—	41	44	49	—	14	18	12
(13) Sweden ..	..	48	53	58	60	—	1	1	—
(14) Portugal ..	..	13	13	11	19	1	2	2	2
(15) Finland ..	..	25	27	27	25	—	—	—	—
(16) Hungary ..	..	26	26	24	29	3	5	9	7
(17) Yugo-Slavia ..	..	20	22	18	20	11	13	14	15
(18) Denmark ..	..	16	16	17	14	—	—	—	—
(19) Norway ..	..	5	5	6	6	—	—	—	—
Europe Total ..		1,705	1,854	1,851	2,020||	462	648	695	491||
ASIA :									
(1) India ..	..	42	13	9	21	1,515	1,418	1,315	1,351
(2) Japan ..	..	571	650	747	772	651	1,024	1,004	844
(3) *China ..	..	7	40	37	39	30	30	42	31
Asia Total ..		620	703	793	832	2,196	2,472	2,361	2,226
AMERICA :									
(1) U.S.A. ..	..	2,610	3,005	3,998	3,263	30	32	38	30
(2) Canada ..	..	120	128	151	121	1	1	—	—
(3) Mexico ..	..	—	22	—	—	—	—	—	—
(4) Brazil ..	..	—	—	—	—	—	—	—	—
America Total ..		2,730	3,155	4,149	3,384	31	33	38	30
Other Countries ..		86	43	22	33	10	15	10	14
HALF-YEAR'S TOTAL ..		5,141	5,755	6,815	6,269||	2,699	3,168	3,104	2,761||

‡ Austria included under Germany for July, 1938.

* Estimated.

for the half-year ending 31st July, 1938,
returns made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
July 31 1938	Jan. 31 1938	July 31 1937	July 31 1936	July 31 1938	Jan. 31 1938	July 31 1937	July 31 1936	July 31 1938	Jan. 31 1938	July 31 1937	July 31 1936
146	183	206	175	235	369	382	281	1,071	1,429	1,455	1,385 (1)
73	60	65	?	319	273	254	?	622	549	541	? (2)
66	64	81	70	94	92	97	77	568	581	602	599 (3)
—	—	—	—	1,400	1,206	1,059	914	1,400	1,206	1,060	973 (4)
39	38	44	27	12	47	35	20	320	327	329	274 (5)
22	24	26	21	25	40	45	19	167	205	237	201 (6)
4	4	5	3	51	58	53	43	184	229	230	182 (7)
1	1	?	21	90	84	34	14	92	85	34	130 (8)
14	13	16	16	78	48	27	13	182	154	132	140 (9)
20	23	24	19	8	14	12	8	44	60	60	46 (10)
2	2	3	1	63	64	64	53	141	146	149	118 (11)
—	11	11	9	—	26	28	19	—	92	101	89 (12)
5	4	4	3	3	5	5	1	56	63	68	64 (13)
3	3	3	3	26	27	27	15	13	45	43	39 (14)
1	1	1	1	3	3	3	2	29	31	31	28 (15)
5	6	7	7	7	14	19	20	41	51	59	63 (16)
3	3	3	5	6	6	3	5	40	44	38	45 (17)
—	—	—	—	1	1	1	1	17	17	18	15 (18)
—	—	—	—	—	1	—	—	5	6	6	6 (19)
404	440	499	381	2,451	2,378	2,148	1,505	5,022	5,320	5,193	4,397
30	33	27	18	180	171	189	141	1,767	1,635	1,540	1,531 (1)
44	52	67	43	297	371	243	198	1,563	2,097	2,061	1,857 (2)
4	4	15	12	614	241	1,169	1,073	655	315	1,263	1,155 (3)
78	89	109	73	1,091	783	1,601	1,412	3,985	4,047	4,864	4,543
16	22	28	22	13	22	27	13	2,669	3,081	4,091	3,328 (1)
2	3	5	3	—	1	—	2	123	133	156	126 (2)
1	—	1	—	94	74	103	93	95	96	104	93 (3)
—	—	—	—	307	313	350	337	307	313	350	337 (4)
19	25	34	25	414	410	480	445	3,194	3,623	4,701	3,884
70	63	40	37	302	313	307	243	468	434	379	327
571	617	682	516	4,258	3,884	4,536	3,605	12,669	13,424	15,137	13,151

|| Exclusive of Germany.

Estimated COTTON MILL STOCKS on comparison on basis of Spinners' returns

COUNTRIES		IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		July 31 1938	Jan. 31 1938	July 31 1937	July 31 1936	July 31 1938	Jan. 31 1938	July 31 1937	July 31 1936
EUROPE :									
(1)	Great Britain ..	93	86	70	54	86	59	100	69
(2)	†Germany ..	42	54	20	?	26	14	13	?
(3)	France ..	116	130	109	88	84	61	97	98
(4)	†Russia ..	—	—	—	6	—	—	—	—
(5)	Italy ..	96	125	69	79	20	20	25	20
(6)	Czecho-Slovakia ..	50	49	32	29	14	12	20	12
(7)	Belgium ..	37	40	28	32	35	34	61	44
(8)	**Spain ..	—	—	?	15	—	—	?	5
(9)	Poland ..	15	8	7	12	1	1	1	2
(10)	Switzerland ..	21	22	13	11	9	8	13	8
(11)	Holland ..	29	41	25	18	16	14	21	18
(12)	†Austria ..	—	13	8	9	—	2	4	4
(13)	Sweden ..	23	33	20	19	—	—	1	—
(14)	Portugal ..	6	6	2	3	1	—	2	1
(15)	Finland ..	10	12	6	5	—	—	—	—
(16)	Hungary ..	12	14	7	6	3	3	8	6
(17)	Yugo-Slavia ..	4	11	4	4	8	6	10	12
(18)	Denmark ..	6	8	5	5	—	—	—	—
(19)	Norway ..	4	3	3	3	—	—	—	—
¶Europe Total ..		564	655	428	398	303	234	376	299
ASIA :									
(1)	India ..	59	24	7	9	1,308	875	972	932
(2)	††Japan ..	?	?	304	205	?	?	457	310
(3)	*China ..	?	?	18	19	?	?	23	24
¶Asia Total ..		59	24	329	233	1,308	875	1,452	1,266
AMERICA :									
(1)	U.S.A. ..	1,224	1,716	1,223	856	9	12	18	8
(2)	Canada ..	59	66	81	59	1	—	—	—
(3)	Mexico ..	—	—	—	—	—	—	—	—
(4)	Brazil ..	—	—	—	—	—	—	—	—
America Total ..		1,283	1,782	1,304	915	10	12	18	8
Other Countries ..		24	11	7	8	6	4	4	4
¶HALF-YEAR'S TOTAL ..		1,930	2,472	2,068	1,554	1,627	1,125	1,850	1,577

† No returns from Russia. Figures for this country are estimated from trade sources.

** No returns from Spain since January 1936. Figures since then have been estimated.

* No returns from China since January 1937. Figures for July 1937 have been estimated.

†† No returns from Japan since July 1937.

31st July, 1938, with previous figures for
made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
July 31 1938	Jan. 31 1938	July 31 1937	July 31 1936	July 31 1938	Jan. 31 1938	July 31 1937	July 31 1936	July 31 1938	Jan. 31 1938	July 31 1937	July 31 1936
54	46	55	51	81	79	96	69	314	270	321	243
25	17	10	?	162	142	24	?	255	227	67	?
42	41	39	51	68	64	68	63	310	296	313	300
—	—	—	—	550	610	360	263	550	610	360	269
19	22	22	18	32	28	20	18	167	195	136	135
11	12	14	8	11	11	15	5	86	84	81	54
4	2	3	2	33	22	24	17	109	98	116	95
—	—	?	8	?	—	?	3	?	—	?	31
4	3	3	3	32	6	7	2	52	18	18	19
20	22	15	14	12	9	10	8	62	61	51	41
2	1	1	1	24	31	34	22	71	87	81	59
—	4	4	4	—	4	7	6	—	23	23	23
4	2	2	2	4	2	2	1	31	37	25	22
1	1	1	1	7	8	7	5	15	15	12	10
1	1	1	1	1	1	1	1	12	14	8	7
3	3	2	3	3	5	8	4	21	25	25	19
1	1	1	1	2	4	4	5	15	22	19	22
—	—	—	—	1	—	—	—	7	8	5	5
—	—	—	—	—	—	—	—	4	3	3	3
191	178	173	168	1,023	1,026	687	492	2,081	2,093	1,664	1,357
26	24	16	13	115	69	94	62	1,508	992	1,089	1,016
?	?	34	20	?	?	112	66	?	?	907	601
?	?	5	5	?	?	336	344	?	?	382	392
26	24	55	38	115	69	542	472	1,508	992	2,378	2,009
18	17	21	17	9	12	21	10	1,260	1,757	1,283	891
2	1	2	2	1	—	—	1	63	67	83	62
2	—	—	—	49	36	43	41	51	36	43	41
—	—	—	—	143	120	130	92	143	120	130	92
22	18	23	19	202	168	194	144	1,517	1,980	1,539	1,086
23	22	35	14	154	154	158	126	207	191	204	152
262	242	286	239	1,494	1,417	1,581	1,234	5,313	5,256	5,785	4,604

|| Exclusive of Germany.

‡ Austria included under Germany for July, 1938.

¶ With exceptions as indicated.

ESTIMATED TOTAL WORLD'S COTTON
years ended 31st July, 1938, and 31st Jan.,
the International

COUNTRIES	TOTAL ESTIMATED NUMBER OF SPINNING SPINDLES		MULE SPINDLES	
	Half-year ended		Half-year ended	
	July 31, 1938	Jan. 31, 1938	July 31, 1938	Jan. 31, 1938
EUROPE :				
(1) Great Britain	36,879	37,340†	26,359	26,752
(2) ‡Germany	11,074	10,323	2,858	2,791
(3) France	9,794	9,783	2,303	2,303
(4) *Russia	10,050	10,050	1,000	1,000
(5) *Italy	5,350	5,395	570	482
(6) Czecho-Slovakia	3,330	3,357	1,205	1,239
(7) Belgium	1,986	1,993	264	269
(8) *Spain	2,000	2,070	400	431
(9) Poland	1,748	1,715	409	444
(10) Switzerland	1,241	1,248	341	346
(11) Holland	1,209	1,206	250	241
(12) ‡Austria	—	742	—	212
(13) Sweden	557	546	31	37
(14) Portugal	490	469	130	130
(15) Finland	310	311	34	38
(16) Hungary	305	317	59	30
(17) Yugo-Slavia	184	177	29	29
(18) Denmark	101	99	—	—
(19) Norway	43	44	3	3
Total Europe	86,651	87,185	36,245	36,777
ASIA :				
(1) India	9,731	9,763	544	544
(2) Japan	12,550	12,297	9	8
(3) *China	4,300	4,000	—	—
Total Asia	26,581	26,060	553	552
AMERICA :				
(1) U.S.A.**	26,376	26,611	326	438
(2) Canada	1,137	1,136	64	64
(3) Mexico	830	843	5	5
(4) Brazil	2,725	2,719	17	18
Total America	31,068	31,309	412	525
Other Countries	2,853	2,665	267	277
Grand Total	147,153	147,219	37,477	38,131

*No returns received. Estimated figures given for China, previous figures for Italy, Russia and Spain.

**U.S.A.—The division between mule and ring and the number of spindles on Egyptian is only approximate.

†Of this total, twist spindles 20,494,000; weft spindles 16,846,000.

SPINNING SPINDLES (000's omitted) for the half-1938, on basis of returns made to Cotton Federation.

RING SPINDLES		SPINDLES SPINNING EGYPTIAN COTTON		SPINDLES IN COURSE OF ERECTION		
Half-year ended		Half-year ended		Half-year ended		
July 31, 1938	Jan. 31, 1938	July 31, 1938	Jan. 31, 1938	July 31, 1938	Jan. 31, 1938	
10,520	10,588	15,974	15,598	7	43	(1)
8,216	7,532	1,018	904	—	—	(2)
7,491	7,480	2,222	2,305	5	12	(3)
9,050	9,050	—	—	?	?	(4)
4,780	4,913	800	700	?	?	(5)
2,125	2,118	668	667	4	10	(6)
1,722	1,724	55	74	12	5	(7)
1,600	1,639	—	207	?	?	(8)
1,339	1,271	313	230	20	18	(9)
900	902	738	760	20	7	(10)
959	965	18	33	22	2	(11)
—	530	—	77	—	—	(12)
526	509	72	61	3	—	(13)
360	339	59	48	—	—	(14)
276	273	28	28	—	—	(15)
246	287	64	56	4	3	(16)
155	148	30	22	12	14	(17)
101	99	—	—	—	—	(18)
40	41	—	—	—	—	(19)
50,406	50,408	22,059	21,770	109	114	
9,187	9,219	479	402	29	70	(1)
12,541	12,289	1,000	1,000	?	?	(2)
4,300	4,000	—	—	—	?	(3)
26,028	25,508	1,479	1,402	29	70	
26,050	26,173	1,000	1,000	?	?	(1)
1,073	1,072	28	29	17	—	(2)
825	838	7	—	—	1	(3)
2,708	2,701	—	—	7	20	(4)
30,656	30,784	1,035	1,029	24	21	
2,586	2,388	491	428	34	57	
109,676	109,088	25,064	24,629	196	262	

‡ Austria included under Germany for July, 1938.

**SPECIFICATION OF PART OF THE COTTON RETURNED AS "SUNDRIES" (IN ACTUAL BALES)
Six Months ending July 31st, 1938, estimated from Actual Returns**

CONSUMPTION

Country	Peruvian	Brazilian	Argentine	West Indian	Mexican	Turkish	Russian	Iraq	Sudan	East African	West African	South African	Chinese	Others	Total
Great Britain ..	39,305	82,553	3,716	3,948	203	737	14,585	15	64,052	11,281	8,978	203	—	5,224	234,810
Germany ..	—	—	—	—	—	—	—	—	—	—	—	—	—	318,538*	318,538
France ..	3,013	39,012	437	285	—	974	—	—	9,147	803	16,801	—	—	24,113	43,562
Italy ..	302	4,204	816	—	2,477	18,531	—	—	2,733	—	4,376	—	—	43,562	43,562
Belgium ..	5,806	5,382	—	—	—	—	—	—	3,000	—	37,150	—	—	2,356	51,199
Switzerland ..	765	529	32	—	11	5	—	—	1,095	1,651	2,871	—	—	—	5,559
Poland ..	3,746	13,640	—	—	—	450	4,743	—	3,711	6,373	42,416	907	—	—	78,408
Holland ..	2,303	5,706	—	—	—	—	8	—	3	127	37,292	—	—	17,840	63,279
Czecho-Slovakia ..	1,508	4,039	—	—	126	1,376	—	179	1,370	849	12,791	—	—	2,319	24,560
Sweden ..	—	1,952	—	—	—	—	—	—	—	845	428	—	—	—	3,225
China ..	—	—	—	—	—	—	—	—	—	—	—	—	614,000	—	614,000
Brazil ..	—	307,118	—	—	—	—	—	—	—	—	—	—	—	—	307,118
Mexico ..	—	—	—	—	94,713	—	—	—	—	—	—	—	—	—	94,713
Japan ..	—	54,979	—	—	—	—	—	—	—	9,675	—	—	159,390	—	297,415
Hungary ..	69	1,900	—	—	—	—	—	—	824	—	4,071	—	—	—	6,864
India ..	727	107	105	320	—	—	1	—	27,869	132,638	7,401	8,883	—	—	177,991
Total ..	57,544	521,121	5,106	4,553	97,530	2,073	19,346	105	111,944	164,242	174,668	9,993	—	—	2,416,415

STOCKS

Country	Peruvian	Brazilian	Argentine	West Indian	Mexican	Turkish	Russian	Iraq	Sudan	East African	West African	South African	Chinese	Others	Total
Great Britain ..	11,990	15,060	356	4,025	183	9	3,078	—	36,926	4,257	3,775	246	—	1,996	81,301
Germany ..	—	—	—	—	—	—	—	—	—	—	—	—	—	162,000	162,000
France ..	1,767	19,547	225	151	—	159	—	—	16,832	—	14,244	—	—	15,260	69,185
Italy ..	55	3,787	15	—	177	14,950	—	—	3,784	1,352	3,784	—	—	4,896	32,310
Belgium ..	1,127	6,253	—	—	39	—	—	—	23,691	—	23,691	—	—	1,565	32,816
Switzerland ..	1,248	1,846	26	—	—	—	4,304	—	3,497	3,497	22,050	37	—	—	11,711
Poland ..	1,318	2,628	—	26	—	610	1,327	—	1,827	331	22,050	—	—	—	32,755
Holland ..	187	951	—	—	127	1,401	370	—	18	81	8,922	—	—	10,363	10,732
Czecho-Slovakia ..	—	1,546	—	—	—	—	—	—	1,100	423	4,208	—	—	1,964	9,713
Sweden ..	—	143,980	—	—	—	—	—	—	—	789	1,378	—	—	—	143,980
Brazil ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Mexico ..	78	600	—	—	51,142	—	—	—	—	—	2,644	—	—	—	51,142
Hungary ..	—	—	—	—	—	—	—	—	—	—	2,917	—	—	—	3,458
India ..	99	—	—	14	—	—	—	—	18,490	86,944	2,917	5,548	—	—	113,712
Total ..	19,036	196,551	622	4,216	51,668	17,129	7,884	—	81,476	97,374	90,858	5,881	—	198,081	770,726

Bale Weights (Gross) in lbs.: Peru 480, Brazil 396, Argentina 500, West Indian 500, Mexico 500, Russian 396, Iraq 413, Sudan 450, E. Africa 410, W. Africa 414, S. Africa 500, Australia 511, Chinese 520, Paraguay 402, Turkey 400.

*Unspecified.

The following figures show the consumption of cut Rayon or Artificial Silk Staple Fibre *by the cotton spinning industry* in certain specified countries, during the half-year ending July 31, 1938, and the number of spindles engaged in the production of such yarns :—

Country	No. of Spindles producing Artificial Silk Yarn	Quantity of Arti- ficial Silk Staple Fibre Spun (in lbs.)
Great Britain	552,967	10,485,748
France	47,112	1,403,161
Germany	*	103,919,400
Sweden	24,665	1,060,098
Poland	261,754	3,249,497
Holland	13,828	720,941
Hungary	4,560	1,095,040
Other Countries	26,925	989,155

Countries listed under "Other Countries" include Switzerland, Finland, Norway, Denmark, Canada and Mexico. This has been done in order to avoid disclosure of the activities of individual firms.

* A large proportion of the staple fibre used in Germany is used in conjunction with cotton. In consequence, it is impossible to give the number of spindles engaged upon the production of artificial silk yarn exclusively.

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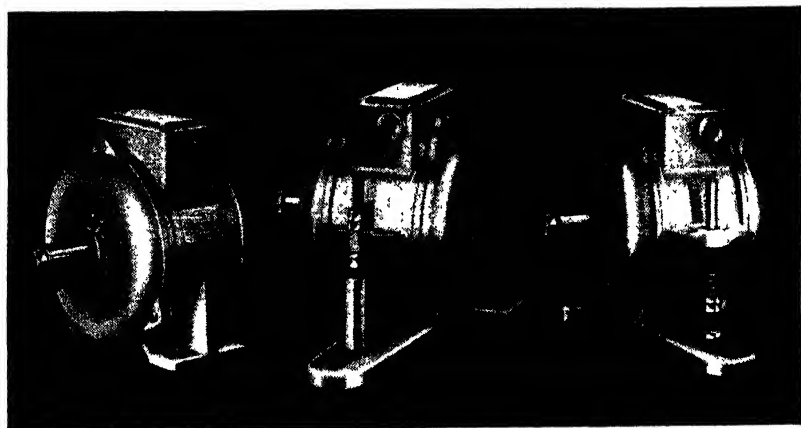
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As illustrated, the motors are supplied either with feet, hinged base or spring suspension.

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AUTOMATIC STRIPPING FOR CARDS

The "Static" automatic stripping apparatus for carding engines, the sole licensees for which are the Casablancas High Draft Co. Ltd., is one of the new patents recently brought to the notice of the trade.

The "Static" automatic stripper for cards is proposed by the makers as a solution of stripping problems.

The makers claim that by the adoption of their "Static" system the card can normally work without having to be stripped for a period of time much longer than usual, say up to forty-eight hours, and even more, according to circumstances. The carding obtained under these working conditions is perfect, and the sliver is of the highest regularity. On the other hand, no extra power is required, and there are no upkeep expenses.

The "Static" system is based on the electro-static induction obtained by the rubbing of the fibres and of the air displaced by the card cylinder in its rotary movement, against the special surface of the apparatus. It is a stationary arrangement, which also distinguishes it essentially from other stripping systems which consist mainly of revolving mechanisms, and the apparatus has no point of contact with the wires of the cylinder.

Placed a little distance away from the clothing, its electro-static action attracts the fibres and causes them to stay on the surface of the wire, whereby the carding is effected in a perfect manner.

The "Static" stripping apparatus prevents the gradual accumulation of fibres between the wires of the cylinder and the ultimate choking of the card-clothing. It suppresses the necessity for frequent stripping, thus achieving a greater regularity of hank and an improvement in the average evenness and the strength of the final thread. During the time which the cards fitted with the "Static" apparatus work uninterruptedly, the web is always uniform and perfectly carded. The time is, as has been indicated, anything up to forty-eight hours, according to the quality of the cotton, the hourly production and the condition of the clothing.

The advantages claimed by the makers for the "Static" automatic stripping apparatus may be briefly summarised as follows :—

Reduction in waste, saving of cotton.—Instead of stripping 16 times in forty-eight hours (every three hours) the card is stripped only once

or twice. This enables the waste to be reduced to a strict minimum, and the spinner profits by all the good cotton which passes through the card.

Reduction of Labour Costs.—As a direct result of the reduction in the frequency of the strippings.

Increase of Production.—This amounts to 2 or 4 per cent., represented by the reduction in the stoppages necessary for stripping.

Saving of Driving Power.—Of great importance especially when vacuum stripping is employed.

The application of the "Static" apparatus, furthermore, ensures the much longer life of the clothing which suffers considerably by stripping, especially if it is done by brush.

SYSTEMATIC CONTROL IN THE SPINNING ROOM

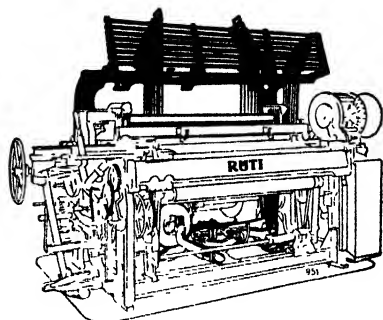
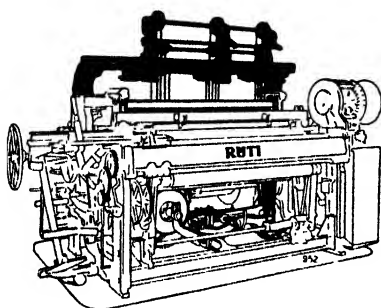
The following article was written for the September, 1938, issue of the *Textile World* by Mr. Theodore E. Carlson.

Spinning rooms that are producing only one or two yarn numbers should present no doffing problems as far as piece rates or work loads are concerned. However, most mills of today are highly diversified, and, often, the attempt to assign equal work loads at lowest costs and highest efficiencies actually causes the doffing cost to go over the budget. There are several systems of doffing and several methods of setting piece rates, but in the opinion of the writer the simplest way to install rates and work loads per doffer and still have some assurance of keeping within the budget, is given here.

The following factors are all the data required: length of time per doff for each number; average number of bobbins doffed per doffer per hour (this is overall time and includes getting bobbins, wheeling truck to frame, making out tickets, stopping frame, winding rail down, doffing, etc.). Once the above two factors are known, it is a simple matter to set up a spinning room work load.

Most mills have the information required as to the doff time per count at given speeds, twists, rings, etc. However, should this information not be available, it can be easily obtained by timing the run of the various counts under operating conditions. When this time per number has been established the number of bobbins per frame per hour can be figured as follows: $\text{Hours per doff} \div \text{Spindles per frame} = \text{Bobbins per hour for that number}$.

The bobbins per hour for each count multiplied by the number of frames on each count will give the number of bobbins to be doffed per hour. To determine the number of doffers required with the room set up as it is, divide the number of bobbins to be doffed per hour by the



The new Ruti loom with low frame, without any superstructure and with lateral suspension of the shafts, is an important improvement comparatively to the old system with the shadow casting. The view in the shed is now free and unobstructed ● both natural and artificial

illumination are improved ● also the control of the warp ● no more soiling of the warp and therefore spoiling of the cloth through oil splashes and dust ● the shafts are easier to deal with ● **The output is raised ● the goods are improved in appearance and quality.**

RUTI

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doffer's capacity per hour, which is about 1,000 bobbins less a 10 per cent. rest factor.

In order to reduce the possibility of peak-load conflict due to several frames being ready to doff at the same time, the spinning room can be divided into two-doffer allocations, and each section assigned to a certain pair of doffers. The doffer will be saved a great deal of unnecessary running around if the spinner will stand a brightly painted slubber bobbin or flag on the frame to indicate that it is ready to be doffed. As the doffer brings the yarn boxes from the frame, he keeps the stub of the doff ticket for himself and leaves the ticket at the yarn desk for the weigher, or whoever has charge of receiving the yarn. These tickets are collected daily by the second hand, and of course should check with the stubs held by the doffer. If required, the doffer's stubs can be initialed by some second person to certify the actual doffing of the frame.

To control the spinning room, the overseer or second hand should have a board at his desk arranged in the same manner as the frames on the floor, with a hook to represent each frame. Every hook should have a ticket marked with the number of yarn, twist, speed, type bobbin, etc., and the bobbins per hour for that count. Unless there is an unusual amount of frame changing, a daily check-up should suffice to inform the overseer of the number of doffers required.

In order to prevent short doffing, or taking a doff off that is not quite

full, the overseer should set the minimum allowed, by use of the bobbin rings on filling wind, or gauge on warp wind.

For the guidance of anyone interested in trying this system the following may be helpful :—

1. A doffer's capacity should be about 1,000 bobbins per hour. Allow a sufficient rest factor, about 10 per cent.
2. If a small part is left over after assigning the allocations, a learner should be put in charge of it rather than have it divided up among the already full sections.
3. Doffers should be allowed time to piece up so that the spinners will not lose production.
4. Be sure that doffing trucks are compact and of good design.
5. Keep bobbins clean and in good condition.

It is easy enough to determine whether use of this system will benefit operation of the spinning department, by getting data together and laying the room out. Try two doffers on one section for a few weeks. Then if this one section proves satisfactory, the system can be applied to the entire room.

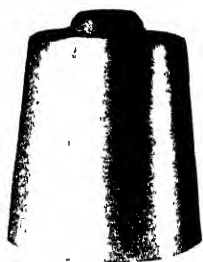
NEW SOVIET KNOTTER

The process of knot-tying in weaving has great influence on the productivity of labour and the quality of production. The knot-tyers which have been in use hitherto have been complicated and expensive, or have defects which detracted from the quality of the production. The Soviet engineer, M. B. Bashkirov, has successfully solved the problem of knot-tying with an original invention. The attachment he has built has been tested in the Leningrad spinning and weaving mills "Anisimov" and "Rabochoy," where it has been highly approved. The invention makes knots of equal size and of fine quality. It simplifies and accelerates the weaver's methods, and so enables time to be saved on this operation. At the "Rabochoy" mills, for instance, by the application of the new invention, knot-tying was speeded up from two to three times. Similar results have been obtained by the workers in the Anisimov mills. In addition knot-ends have been reduced to almost one-third of their previous length. A special conference at the Chief Administration for the cotton industry of the Leningrad region has approved of the invention, and it has been decided to supply it for use in Leningrad mills and to recommend it to enterprises under the control of the other textile administrations.

(Monthly Review of the U.S.S.R. Trade Delegation in the U.K.)

A Necessary Evil?

We are not for a moment suggesting that our winding is bad, in fact the reverse is true, but there has long been a thought in the Industry that winding was a necessary evil. However, just as adversity strengthens a man so winding improves the yarn during the process. A cleaner and stronger yarn is produced and in a form which is eminently suitable for the next process it has to undergo.



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TESTING OF TEXTILE MATERIALS

The annual meeting of the American Society for Testing Materials, 260 S. Broad Street, Philadelphia, was held on June 27 to July 1. The report of Committee D13, Textile Materials, gives a number of new proposals for standards and revisions of standard tests.

A new proposal is the method for the quantitative determination of tussah silk in mixtures with other fibres. Another new tentative standard is for testing and tolerances for spun rayon yarns and threads. New tentative specifications are proposed for single-ply bleached cotton broadcloth, bleached wide cotton sheeting, and terry towelling. It is proposed to withdraw specifications for Osnaburg cement sacks and 3/5/23's tyre cord. Methods of testing tyre cord are revised.

THE TEXTILE MACHINERY EXHIBITION

The Textile Machinery Exhibition was held at Belle Vue, Manchester, from October 12 to October 22. The exhibition was international in character as was seen by the number of overseas firms showing their new machinery and the overseas visitors who attended. The Exhibition was under the control of the textile machinery trade itself, and thus represented a combined educational effort on the subject of equipment for textile production. Amongst a number of outstanding developments and trends on show may be mentioned, high-draft cotton spinning, ring frames, cone winders, automatic pirn winders, automatic shuttle-changing box looms for rayon weaving, the use of stainless steel machinery for dyeing and finishing, and many other items of progress affecting almost every process or interesting every individual firm.

A NEW PROCESS IN PREPARATORY COTTON SPINNING

Franz Pless (Melliand Textilberichte, Heidelberg, German edition, 1938, 10, 781). It has always been felt to be a great drawback of the present method of the preparatory spinning of cotton that the layers of the lap of card sliver are apt to adhere to one another in the can, causing the fibres to become entangled, so that the sliver has a rather disarranged appearance as it leaves the can. The author has developed a new patent process which is intended to overcome that difficulty. One of the draw-off rollers in the cover of the coiler is provided with a narrow groove, in which a ring on the opposite roller engages. By means of that arrangement all loose fibres are pressed into the fibrous structure of the slubbing, so that the smooth sliver produced is uniform and also thin. Uniformity diagrams and photographs of sliver are shown in the article to demonstrate the advantages of the new process.

TWO HUNDRED YEARS OF THE COTTON SPINNING MACHINE

By ERNEST BRASCHLER, ZÜRICH

PROCESSES DURING SPINNING.

When speaking of spinning in general, we have to distinguish between the preliminary cleaning, opening and fibre parallelizing operations on one hand and the proper spinning operations on the other. Today there is also a transitional process called slubbing or roving which is, by its very nature, a kind of spinning process. Yet it belongs to the preliminary spinning operations.

Spinning in a strict sense means then, three partial operations, viz. : (1) Drafting the textile material to the desired and definite fineness ; (2) Twisting the fibres of the drafted material together so as to form a solid strand, thread or yarn, and (3) Winding the drafted and twisted material in the form of a cop or on a bobbin. If the drafting, twisting and winding processes are done at the same time, the spinning is said to be continuous, but when the winding is done separately, the process is intermittent.

THE SPINDLE.

Since immemorial times, for thousands of years, the tool for spinning has been the spindle, which is a long, slender and round piece of wood, iron or steel. At some unknown period, the spindle was provided with a small disc or wharve which facilitated the driving and which ensured a steadier movement of the spindle.

The textile material to be spun was attached to the distaff and drawn from it and drafted with the fingers of one or both hands and this in the same time as the spindle revolved and twisted. During these operations the thread was knotted round the spindle top. When a new length had been spun, the knot was opened and the spun thread was finally wound round the spindle into a self-contained cop. Drafting and twisting were done simultaneously, winding in a separate process. Hence this system of spinning was intermittent.

THE HAND SPINNING WHEEL.

One of the first considerable technical improvements was the fixing of the spindle horizontally in a bearing and the driving of the spindle respectively with the aid of a cord or string from a fly-wheel turned by hand. Such wheels are still in use today in the Far East and India. In these wheels it was no more necessary to knot the thread round the spindle top during spinning ; the thread was just guided in an obtuse angle towards the spindle.

THE FLYER SPINDLE.

At some unascertainable period the spinning was carried out by dividing the twisting and winding function of the spindle ; the spindle was provided with a flyer fixed firmly to it and which had as its purpose the twisting of the material and at the same time to guide it tangentially to the spool. The spool which was loose on the spindle, wound the thread on to it.

As a rule it was now the spool that was driven from the flywheel, the flyer and spindle being revolved as the thread passed through the flyer. In this system the spool was driving, that is, it moved faster than the flyer or spindle ; to use *termini technici*, this frame was spool or bobbin-driven.

The strain to which the yarn was subjected when pulling round the flyer spindle, was greatly reduced with the adaption of a positive drive not only for the spool or the bobbin, but also for the flyer and spindle ; of course to wind up the thread, the speeds were different. This system of positive drive for the flyer spindle and the spool allowed as an alternate method the speed of the spindle and flyer to be faster than the spool or bobbin ; in this case the frame is said to be flyer-lead.

THE TREADLE SPINNING WHEEL.

Another very important improvement was the construction by Johann Jürgen, of Wattenbüttel, near Braunschweig, who in about 1530 employed a treadle to turn the flywheel, which hitherto had been driven by hand. By this means, both

hands became free for the drafting operation and the process of spinning was much simplified and the production increased.

This improved spinning wheel from Braunschweig—or Brunswick as it was called in Low German (and English)—was introduced into England. It remained in use up to the beginning of the 18th century for spinning flax, wool, and to some small extent also, cotton. As a rule, it was a one-treadle spinning wheel. But in some cases, there were also two spindles and the spinner who was able to manage such a spinning wheel could double his production.

Yet the production was still low and slow, especially also in regard to the production of the loom and several spinners had to work to provide one weaver with yarn. This unsatisfactory condition was made worse when John Kay, a native of Bury on the 26th May, 1733, took out his patent for the fly shuttle. By means of this invention the shuttle was moved with the aid of a picking or throwing peg and the weaver only needed now one hand to move the shuttle, the other hand actuating the sley; the weaver was able to double his production and at the same time to weave a wider cloth.

It should be mentioned here that spinning with the treadle spinning wheel as known up to 1733 was mechanical only in so far as to the twisting and winding and that the function of drawing out the textile material to the definite fineness was still done by hand. The production of the treadle wheel was dependent upon the skill with which the spinner could draft the material with his or her fingers and thus very limited in respect to speed and accuracy.

MECHANICAL DRAFTING.

It was Lewis Paul, of Birmingham, originally a foreigner, who patented in 1738, "A New Invented Machine or Engine for the Spinning of Wooll and Cotton" and which permitted the drafting of the textile material mechanically.

The implements used by Lewis Paul for drafting were pairs of rollers that revolved with increased surface speed. This invention soon relieved the process of spinning so much, that it became possible to fit one spinning frame with a dozen spindles and later as many as fifty spindles; furthermore, the new frame could be driven by horse or donkey capstan, and also by water power and the production could be increased considerably.

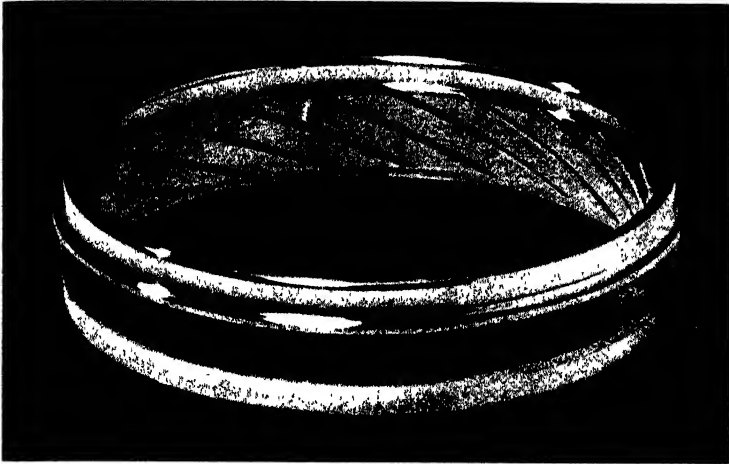
The spinning machine of Lewis Paul was the first step in the mechanisation of the hand or treadle spinning wheel and the basis of its conversion to the factory system. The feature of a factory is the co-operation of machinery, mechanical power and capital. The first cotton mill founded by Lewis Paul and his partner John Wyatt, in Birmingham in 1741 existed only a few years and it closed down entirely in 1742 or 1743. Nevertheless spinning engines with rollers to draft the material, seemed to be used in the mill of Mr. Cave, in Northampton, driven by water power and which worked from 1743 up to 1764.

FIRST SPINNING ENGINE.

The machine of Lewis Paul, patented in 1738 is the first real spinning engine, since it employed all the important functions during spinning such as drafting, twisting and winding mechanically. Yet there were many obstacles to the quick extension of the new machine. First the machinery was made very crudely and frequent repairs were necessary. Secondly, although even the machine produced more yarn per spindle than attained by the previous methods, the new machine needed many hands. We know that in Cave's mill in 1743 for 250 spindles, 50 workers were required, that is when a two-shift is assumed, a 100 workers per 1,000 spindles. Thirdly, the machine in its infancy did not permit the spinning of finer counts with cotton anything higher than 15's or 20's. At that time, finer cotton yarns were imported from India where the natives produced remarkable fine counts with great skill by hand spinning wheels.

Yet, it must be repeated, the machine of Lewis Paul was the first real spinning machine. The anniversary date of this machine fitted with drawing rollers, is the 24th June, 1738, on which day Lewis Paul received a "Letters Patent" according to the system and regulations for patenting, known in England as early as 1623. The technical description, the "Specification" dates from the 20th July, 1738. The patent of Lewis Paul bears the number 562 and it is only the twenty-fifth patent for the category of spinning implements for the completed last 115 years and back to 1623. The patent was printed only in 1856; its specification is contained partially also in the "Abridgments of the Specifications of Patents relating to Spinning," published 1866 from the British patent office.

The original "Letters Patent" and the "Specification" seem to be lost. But true copies written in 1738 are contained in the Patent Roll and Close Roll



MULTIPLE GROOVE RINGS

(PATENT APPLIED FOR)

This new Eadie Ring for grease lubrication offers many of the advantages hitherto only available to users of Eadie Patent Self-oiling Rings—high speeds, long traveller life, light running and 2-3 doffs at one greasing.

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kept in the custody of the Public Record Office in London. The text shown on this page is a photographic copy of the entry made 1738 in the Close Roll and refers to the most interesting part of the specification of 1738.

The Wool or Cotton being thus prepared one end of the Draft Rope Thread or Silver is put betwixt a pair of Rowlers, Cylinders or Cones or some such Movement solid being turned round by their Motion Draws in the Draw Draft of Wool or Cotton to be spun in proportion to the Velocity given to such Rowlers Cylinders or Cones. As the prepared Draft passes regularly through or betwixt these Rowlers Cylinders or Cones a Suspension of other Rowlers Cylinders or Cones moving proportionally faster than the first Draw the Rope Thread or Silver into any Degree of Fineness which may be required sometimes these successive Rowlers Cylinders or Cones (but not the first) have another Rotation besides that which diminishes the Thread yarn or Worsted (viz^t) that though it a small Degree of Twist betwixt each pair by means of the Thread itself passing through the Axis and Center of that Rotation but some other Cones only the first pair of Rowlers Cylinders or Cones are used and the other Rowlers, spools or Bells upon which the Thread Yarn or Worsted is spun is so motioned as to draw faster than the first Rowlers Cylinders or Cones give and in such proportion as the first Draft Rope or Silver is proposed to be diminished.

THE DELIVERY FUNCTION OF ROLLERS.

The patent of Lewis Paul of 1738 regarding the application of pairs of rollers distinguishes between two possibilities, namely, first the use of rollers for the regular delivery of the textile material and second, the employment of different pairs of rollers, placed one behind the other for thinning or drafting of the textile material to the required fineness.

Regarding the use of pairs of rollers for a more regular feed, Lewis Paul states in his patent, in the style of phraseology then usual: "... The wooll or cotton being thus prepared, one end of the mass, rope, thread, or sliver is put betwixt a pair of rowlers, cillinders, or cones, or some such movements, which being turned round by their motion draws in the raw mass of wooll or cotton to be spun, in proportion to the velocity given to such rowlers, cillinders, or cones. ..." The function "draws in" of the rollers corresponds to the function of the delivery rollers of our present day drawing roller systems. The technical improvement is inasmuch remarkable, as it became possible to ensure with this system a regular feed to the spinning machine and hence a yarn of regular thickness and of even count.

This circumstance was—as compared with the conditions when spinning wool, flax or tow—especially important for the working of the relative short cotton, which at the time of Lewis Paul and in the infancy of the cotton manufacture, was purchased mainly from the Levant, Cyprus and Smyrna. Cotton was also planted at that time even in East India but cotton from that country was exported to England only about 1812. Cotton was imported from the United States about 1784, from South America, especially from Brazil, 1781, and from Egypt as late as 1823. The long stapled cottons from Brazil, Egypt and the West Indies were hence not used in England at the time of Lewis Paul. It may be of interest to state here, that the imports of cotton to England was in 1730 only about 1½ million lbs. and remained practically at the same quantity until 1741 when 1,645,031 lbs. were imported.

DRAFTING FUNCTION OF ROLLERS.

The thinning out of the textile material to a definite fineness by means of rollers and pairs of rollers placed one behind each other, with different surface speeds, was described by Lewis Paul as follows: "... As the prepared mass passes regularly through or betwixt these rowlers, cillinders, or cones, a succession of other rowlers, cillinders, or cones, moving proportionably faster than the first, draw the rope, thread, or sliver into any degree of fineness which may be required. ..." This arrangement of different pairs of rollers for attenuating the material corresponds in principle to the drawing roller settings of the present day.

The construction of the rollers has of course changed since the time of Lewis Paul. Lewis Paul employed for the bottom rollers wooden covered iron bars with longitudinal flutes and at the top wooden rollers covered with leather. Today the bottom rollers are made entirely of steel, also fluted lengthwise; the top rollers as a rule are covered with flannel and leather to ensure a good grip, the material for the solid part being iron. But in principle the rollers invented by Lewis Paul are the same as those in use today.

CONTROVERSY AS TO THE REAL INVENTOR.

It has been said that Lewis Paul was not the actual inventor of the drawing rollers but his associate John Wyatt. It is extremely difficult to establish which of these men first conceived the idea of employing drawing rollers on the spinning wheel.

Following the discussion of Julia de Lacy Mann* it can be assumed with much probability that Lewis Paul was the inventor and not John Wyatt. Then the patent and also the specification of 1738 were drawn up in the name of Lewis Paul and in the specification of the 20th July, 1738, John Wyatt clearly signs "... in witness whereof. ..." Further, Lewis Paul has been the technical manager of the business in Birmingham and John Wyatt the commercial manager, occupying himself with the selling of yarns in London. The manuscript book of John Wyatt "A systematical Essay on the business of spinning" is not so much a proof of the technical capacity of its author, than to his defective knowledge of technical proceedings. Lewis Paul furthermore patented other machines in 1748 and 1758 for cotton manufacture and hence proved his identity as an inventor several times.

* "The Cotton Trade and Industrial Lancashire," 1800-1780. Book V, "The Transition to Machine Spinning," p. 411. Manchester University Press, 1931.

The general objections, made by Edward Baines* against Lewis Paul as the inventor of the drawing rollers, are based mainly on a letter of one of the sons of John Wyatt and is no real proof as to the statements that John Wyatt might have been the inventor. Others tried to prove that the invention to spin with drawing rollers was neither made by Lewis Paul nor by John Wyatt, but only by Richard Arkwright thirty years later.

Such objections as made, for example, by Dr. Ure† tried to demonstrate, that based on the specification of 1738 the invention of Lewis Paul was not even possible from the technical point of view and "... merely a fine phrensy of imagination ..." and that with the invention of Lewis Paul, the thread would be "... instantly torn to atoms ..." Dr. Ure comes to this conclusion from the part of the Lewis Paul's specification referring to an alternative possibility of twisting, that is giving simultaneously some twist to the thread during drafting and which seemed, from the theoretical and technical standpoint, quite impossible to him.

As to the alternative twisting, Lewis Paul wrote in his specification, "... sometimes these successive rowlers, cillenders, or cones (but not the first), have another rotation besides that which diminishes the thread, yarn, or worsted, (viz.): that they give it a small degree of twist betwixt each pair, by means of the thread itself passing through the axis and center of that rotation ..." Obviously the obscurity lies in the word "rotation." Perhaps Lewis Paul meant with reference to "another rotation" simply "another movement" and this perhaps is the meaning of a to and fro movement of some rollers, similarly to the movement of some rollers in the spinning cards for the worsted industry. This assumption is justified as already Lewis Paul had on a card, patented at the time, rollers that had a to and fro motion in the direction of the axis so as to increase the carding effect.

ALTERNATIVE OF DRAFTING.

There is no doubt, that the working of the relative short and unripe cotton and the rather defective preliminary cleaning and opening operations rendered the process of spinning with drawing rollers at the time of Lewis Paul difficult. Further, the implements used for spinning, the flyer spindle and especially the winding devices, were very crude in respect to their construction and driving, and produced a heavy load and tension on the thread.

Hence it is no surprise that at the first time there were many obstacles to bring the drawing rollers of Lewis Paul into general use. Hence, in many cases, it must have been better to renounce the application of drawing rollers for drafting and to use the roller pairs only for the regular supply and delivery.

But for such difficulties Lewis Paul found a clever solution, even when taking his first patent in 1738. In that patent he described in lieu of the previously suggested drafting with rollers placed behind each other, an alternate possibility of drafting between the delivery rollers and the spindles or bobbins. He says in this respect, "... In some other cases only the first pair of rowlers, cillende^rs, or cones are used, and then the bobbyn, spole, or quill upon which the thread, yarn, or worsted is spun is so contrived as to draw faster than the first rowlers, cillenders, or cones give, and in such proportion as the first mass, rope, or silver is proposed to be diminished. ..." This system of drafting is also still in use today on mules spinning, e.g., wool and corresponds in principle to the carriage draft in the three line roller mules for cotton.

IMPROVEMENTS FOR DRAFTING.

For the sake of completeness, it may be mentioned that the invention of Lewis Paul in respect of the use of roller pairs for drafting the textile material, has been improved later by the employment of three, sometimes four pair of rollers instead of only two pairs as in the time of Lewis Paul. It was thus possible to draft more gradually, a preliminary small drafting between the back and middle pair loosened the slightly twisted roving and broke it up—hence break draft—and one or two main drafts between the front roller pair and the middle pair or pairs made the final drafting.

Further, the middle roller was altered so as to grip the material passing between them only in a relative way and to allow the long fibres to pass through without

* History of the Cotton Manufacture in Great Britain," Chapter VIII, "The era of inventions," p. 113. Fisher, Fisher, Jackson. London, 1835.

† See introduction to "Abridgments of the Specifications of Patents relating to Spinning," 1866, by B. Woodcroft.

Stubbs

Patent Quick Traverse Doubler Winder

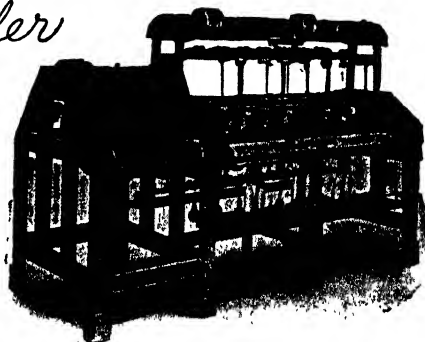
Patent Brake Motion eliminates
"Singles."

Speeds of Drums and Cams can
be independently altered by
change wheels.

Auxiliary Motion prevents
"figuring-up."

Winding speed up to 400 yards
per minute.

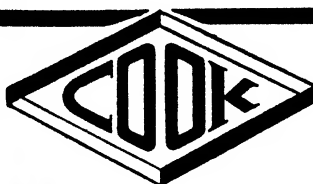
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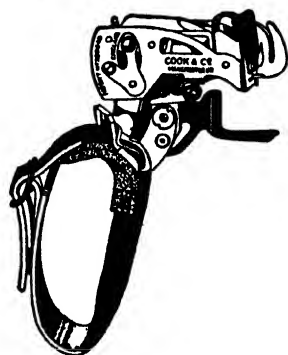
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Speciality



PATENT AUTOMATIC WEAVER'S KNOTTER

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Knot, and is used in winding for trades
where the ordinary knot is too bulky, such
as folded gassed yarns, wool and mixture
yarns.

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•injury. Hence the rollers could be set closer and within the staple length ; the drafting was thus controlled more positively and it was possible to apply higher drafts. Hence, high-drafting.

Finally the middle roller pair has been changed so as to produce by the use of leather tubes not merely a pressure line, but a pressure surface. This system—*e.g.*, Casablancas—was especially favourable for the spinning and drafting of short and irregular staple material, the latter being the case in nearly all natural grown fibres, such as wool, cotton, etc.

How far it will be possible in the future, for the cut rayon staple fibres, to revert to the original two and three-line rollers, experience will demonstrate. The staple of cut rayon staple fibres is practically uniform and the reasons that lead years ago to the complicated mechanism of through-drafting devices, disappeared. Under this prospect the invention of Lewis Paul in 1738 might be valued once again in the original sense.

THE WATERFRAME.

For many years the invention of Lewis Paul to draft with rollers had been out of use, at least it was not in general use and it seemed nearly forgotten. Then in 1769 came the patent of Richard Arkwright, originally a barber, which took up the drafting with rollers. Baines says poetically, "... The invention had disappeared, like a river that sinks into a subterraneous channel, and now rose again under the fortunate star of Arkwright. . . ." But the patent of Arkwright brought no striking novelty and in any case, as stated in the patent specification of Lewis Paul in 1738, it was already in the time of Lewis Paul that drafting with rollers was known, patented and applied.

It is surprising that the patent of Arkwright of 1769 was not rejected, since his specification "... from the bobbin . . ."—he means the roving bobbin—" . . . it passes through a pair of wooden rollers to the drawing rollers and by one pair of rollers moving quicker than the other, draws it finer for twisting which is performed by the spindles . . ." brings as a new feature only the application of three lines of rollers instead of two as applied by Lewis Paul. That, in principle, the use of drawing rollers was not new was stated, *e.g.*, by Thomas High who said at the case of Arkwright before the King's Bench in 1785 regarding a carding engine, that he had used drafting rollers as early as 1767. The above-mentioned patent regarding a carding engine dating 1775 was abolished in 1785 at the King's Bench. The first patent of Arkwright in 1769 could not be abolished as in the case of 1785 as it had already expired, namely, in 1783. When Arkwright could not claim actual invention, his practical sense, however, brought ideas and inventions to perfection and to practical use ; it is in this respect, that the cotton industry is under an obligation to him.

Arkwright, who became a very rich man, had his first mill in Nottingham driven by horse-power, and his second mill in Cramford by water-power. The application of water was very successful and in the zenith of Arkwright, his machines were called " water frames " and their yarns " water twist," an expression that is still in use today to designate hard twisted yarns for twist and warp purposes. It may be added that steam was only used in 1785 for the first time to drive cotton mills. This was done in 1785 at the mill of Messrs. Robinson, in Papplewhich, Nottinghamshire.

THE SPINNING JENNY.

Yet the waterframe was far from satisfactory. James Hargreaves, originally a weaver, dropped the system of drafting with rollers and returned with his " spinning Jenny " patented in 1770 back to the system of drafting between delivery rollers and spindle or spool, a system that had already been mentioned by Lewis Paul as an alternate possibility of drafting in his specification of 1738.

The delivery mechanism was in the spinning Jenny mounted on a carriage that moved to and from the stationary and vertically mounted spindles. The delivery implement was a kind of clasp that held the threads fast during drafting and twisting ; when a new draw had to be delivered, the clasp was opened. The spinning motion was hence again periodical as in the case of the hand spindle and hand spindle spinning wheel before the invention of the flyer spindle. The processes were delivering, then drafting and twisting and finally winding.

The spinning Jenny had the advantage of allowing a very reduced load or tension on the thread which permitted the spinning of unusual fine and soft twisted yarns for weft, muslins and for hosiery. Yarns spun with the water-frame of 1769 or the frame of 1738 were only coarse and hard twisted. On the other hand, the spinning working intermittently, produced less than water frames.

The spinning Jenny was also only driven by hand and not by water or horse-power and hence with a modest speed. Yet spinning Jennies were soon widely used since they permitted the spinning of qualities of yarns that could, up to that time, not be spun otherwise.

THE MULE.

But the possibilities of new spinning machines were not yet exhausted. Samuel Crompton, a weaver who himself was accustomed to spin on a spinning Jenny of Hargreaves', combined in about 1779, the system of drafting with rollers as he knew it from the waterframe of Arkwright with the system of twisting as he knew it from the spinning Jenny of Hargreaves'. A poem of those days said : "... The force of genius could no further go, to make a third, he joined the other two ...". The new construction was called the mule, with reference to the two borrowed elements ; the name came not from the system of driving by mules, since this method was known long before the time of Crompton and was not new.

The peculiar feature of the Crompton mule was the use of a stationary delivery and the fixing of the spindles in a carriage that moved to and from the delivery. In the spinning Jenny the delivery was moved to and fro on a carriage and the spindles were stationary. The system of mules also worked intermittently like the spinning Jennies. A transitional construction was the mule Jenny, a machine with a movable carriage, containing the spindles, whereas the delivery implement was the usual clasp of the spinning Jenny. But this machine was soon surpassed by the mule.

It was the mule that finally gave the great impetus to the textile manufacture in general and the cotton industry in particular. The mule allowed the spinning of cotton yarns as fine as desired. Cotton could also be raised in increased quantities, a development which might have been impossible with any other textile material. Parliament voted in 1812 £5,000 to the benefit of Crompton, for his achievement and the service which his mule rendered to England. Later when Crompton had lost his fortune, a public subscription was made to which foreign spinners in France, Switzerland, etc., also contributed their share in appreciation of his invention.

Crompton had not patented his mule. On one hand there was a great interest in improved machinery and the services thus rendered were also recognised by some. But on the other hand there was also the odious dislike of any new invention, especially on the part of the masses and it happened more than once, that machinery was destroyed by the mob, and that even the inventors were threatened and killed ; already John Kay, the inventor of the fly shuttle had to escape abroad and Hargreaves had to move to another place in England to save his life. The authorities in England did very little to oppose the conspiracy against the use of machinery which was known under the name of "Luddism." A historian of those times had to state, "... a large mill at Birkacre near Chorley was destroyed by a mob in the presence of a powerful body of police and military, without any of the civil authorities requiring their interference to prevent the outrage. ..."

Thus technical progress in the 18th century was not at all in all cases an easy and profitable affair ; it was accompanied in many cases by persecutions and danger, by sorrows and troubles, by peril to the inventor's life. We should feel more than grateful to the inventors of those days, we should admire them. But in spite of the difficulties, destiny helped to make the new inventions survive and prosper.

THE SELF-ACTING MULE.

Several inventors helped to make the mule more perfect, especially to make it not only mechanical in performing the different functions, but also automatic. We have to mention here the improvements of William Strutt of Derby, in 1790 and William Kelly of Lanark, in 1792. The latter, in 1790, drove the mule with water power, the mule having been first driven by hand like the spinning Jenny, then from a horse-capstan.

Finally in 1825 and 1830, Mr. Roberts, of the Manchester machine-making firm Sharp, Roberts & Co., patented mules working entirely mechanically for all spinning processes, that is drafting, twisting, backing-off and winding. Backing-off means the process of rewinding the length of yarn forming coils from the spindle nip to the cop during the drafting and twisting operation.

Now it became possible to spin yarns as fine as 250's ; in 1835 cotton yarns as fine as 350's were being spun. When spinning with the original spinning Jenny of Hargreaves, the highest counts were 60's, in exceptional cases 80's. With the water frame of Arkwright, the usual counts were 20's, and in the best conditions only as fine as 40's. But in 1738 or thereabouts, with the frame of Lewis Paul,

spinning of cotton was just possible up to 15's for the bulk of yarns, and in particular cases up to 20's and 24's. The counts mentioned express the length of yarn to a certain weight, that is number of hanks or skeins of 840 yards to one English pound. The higher the length, the higher the count. This system is still in use today for counting cotton yarns.

At the same time, the number of spindles could be greatly increased. The model of Arkwright's spinning frame shows only four spindles; the first model of the spinning Jenny of Hargreaves' has eight spindles, increased later to twelve and sixteen spindles, then to twenty and thirty spindles. The first mules had about 100 spindles; then the number was increased to several hundreds and also made double, that is, there were a carriage and drawing rollers to each side of the head-stock containing the controlling machinery. Even in 1835 mules with 800 to 1,000 spindles were in use, one spinner being able to manage two mules of 1,600 to 2,000 spindles with the help of a piecer, a scavenger or creeler boy.

THE THROSTLE FRAME.

But the continuously working spinning machine invented by Lewis Paul and brought into general use by Richard Arkwright was not abandoned completely; the water frame was also improved in many respects. The gearing was simplified and refined, the power that was needed could be reduced and at the same time, the speed augmented. The improved machine, probably from its singing sound, produced by the rapidly revolving flyer, was called the throstle frame.

The yarns from the throstle frames were strong and very adaptable for the production of calicoes, a weave originally imported from the East Indies; the throstle frame yarns were especially suitable also for the power loom invented in 1785 by the Reverend Dr. Edmund Cartwright. Compared with the production of spinning Jennies and mules, the production was much higher on water frames and throstle frames and hence the cost of production less, the throstle frame yarns being cheaper.

Spinning with throstle frames was in principle not only used for the final spinning of yarns, but also for the preliminary attenuating processes in which the sliver of the card or the sliver of the drawing-frame was drawn out until a final roving was attained, which was suitable to be creeled on the spinning frame. A remarkable improvement in throstle frames for the preliminary roving processes was the introduction of the differential gear by Houldsworth in 1825, which allowed the driving of the spool or bobbin with a very accurate surface speed. As the diameter of the bobbin increased during spinning, the delivering of the rollers remaining constant, the speed of the bobbin had to be decreased in a bobbin lead frame or increased in a flyer lead frame successively. Other machines used for the transitional slubbing or roving process were the can frame in 1817, and the tube frame. But soon the throstle frame with the flyer spindle superseded all other machines used for the preliminary spinning process.

THE RING FRAME.

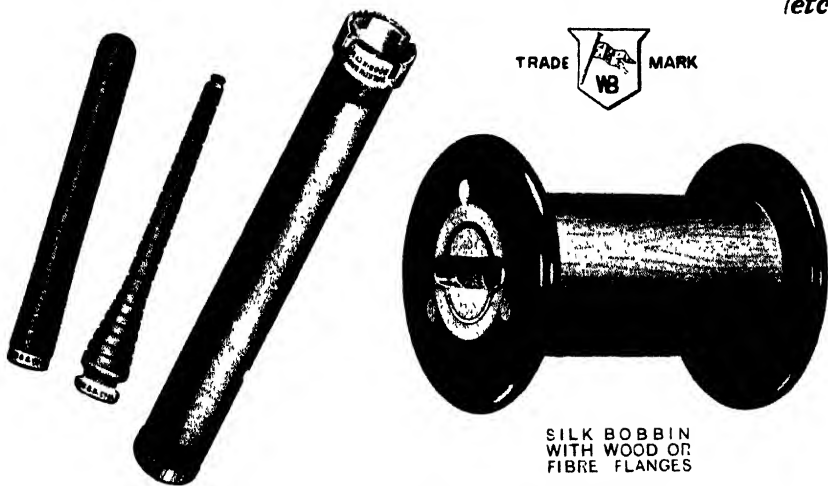
In America, Jenks in 1830 had developed (starting on the principle of the flyer spindle in the throstle frames and in principle hence on the machine of Richard Arkwright and Lewis Paul) a continuous working ring spindle. In this invention the flyer is abandoned and replaced by a small car or traveller, being pulled round the ring that surrounds the spindle by the yarn. The yarn is not wound on the bare spindle as in the mule or spinning Jenny, hand and treadle-spinning wheels, but on a bobbin or at least a solid long paper tube, that can be drawn off, but revolving during spinning with the spindle.

This continuous working spinning frame—ring frame as it is properly called—became popular, especially in America and overseas countries, whereas the old classic textile centres in Great Britain and France worked for a long time with the old-fashioned mules; only latterly have these mules been replaced partially by ring-spinning frames. According to recent statistics* out of 150,960,000 cotton spindles† there were 109,633,000 ring-spindles and only 41,327,000 self-acting spindles. Of these latter Great Britain alone had 29,186,000 self-acting spindles but only 10,752,000 ring spindles, making a total of 39,938,000—spinning spindles. The U.S.A. on the other hand, had out of 27,288,000 spinning spindles 26,849,000 ring spindles and only 439,000 self-acting spindles; in Japan there are out of 11,853,000 spinning spindles only 8,000 self-acting spindles, and in China there are only ring spindles, viz., 5,071,000.

* "International Cotton Bulletin," No. 61, Vol. XVI, 1937, p. 154.

† Excluding spindles for spinning wool, worsted, flax, tow, silk, schappe, rayon, rayon fibres, etc.

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As long as there were mule and ring spindles, there was a great rivalry between both systems. Evidently the ring spindles produced more and cheaper, but the mule made it possible to spin finer counts with softer twist. As long as the ring spinning frame was only used to spin coarse and medium counts and as long as a great quantity of fine yarns was needed, the mule held its ground. But in recent years ring spindles have been improved considerably and also with the latter yarns as fine as 100's and even 140's are spun with great ease and advantage. Further, the category of fine yarns to which the mules alone can be applied is now rather limited, especially due to the artificial silk that became a great competitor to fine yarns above 100's. The bulk of yarns is now spun in very much lower counts than previously, counts for which the ring-spinning frame is very much fitted. As an example it may be stated that out of 1,054,116,664 lbs.* of yarn produced in 1936-37 in India only 61,851,698 lbs., that is 5.86 per cent. was above 40's, the bulk being produced below 40's and in 10's to 20's. The mule is hence disappearing more and more in favour of the ring spindle, a process that has been intensified during the last decade.

ECONOMICAL EFFECT OF THE SPINNING MACHINE.

The striking feature of the modern spinning machine is the great production of yarns per spindle. The spindles now revolve easily at 10,000 r.p.m. and more, and this for hour after hour, day and night, year by year. Little breakages occur and the frames work with an efficiency approximating near to 100 per cent.

The number of hands could be greatly reduced during the period described. Before 1738, one spinner could just manage with the treadle spinning wheel, one spindle and in very exceptional cases two spindles. In 1741 in the mill of Lewis Paul and John Wyatt in Birmingham, there were ten spindles to one operative or 100 workers for 1,000 spindles, including preliminary cleaning, opening, drafting operations. Successively the number of operatives was reduced and today there are many mills having but three operatives for 1,000 spindles, the operatives for the preliminary work included.

This development helped considerably to reduce the cost of production. Of course the reduction of operatives was counterbalanced in some way by the increased wages. In 1830 thereabout, the average wage was 10s. 6d. per week of sixty-nine hours, that is 1.82d. per hour. In 1938, it might be stated that operatives in England averaged from £1 5s. to £2 per week of forty-eight hours, say, 6.25d. to 10d. per hour. The amount of capital for the necessary buildings, machineries, etc., has also risen; further, a very considerable part of the expenses are now accounted for by power.

In general, however, the cost of production has been greatly reduced during the last 200 years, especially during the first part of that period. Without taking into account the value of cotton, the price of a 100's yarn was as follows: In 1786, 38/-, in 1796, 19/-, in 1806, 7s. 2d., in 1829, 3s. 2d., in 1832, 2s. 11d. per lb.; today the price might be 2s. 6d. or thereabouts for a good combed quality. In a similar way, the price of the cloth has fallen which resulted in a considerable increase of textile goods in general and cotton goods in particular.

On the assumption that the average consumption of cotton was .30 million bales per year and taking roughly an average weight of 250 kilos per bale, based on an average count of 20's, this would give a length of yarn of 255 milliards kilometers. Taking an average weight of 150 grammes per square meter, this length and weight of yarn might give a surface of 50 milliards square meters of cloth or 50,000 square kilometers, say, roughly, a strip of cloth 1.25 km. wide round the globe. This is the annual production for cotton only. Such are the productions of cotton manufacture.

SOCIAL INFLUENCE OF SPINNING MACHINERY.

Though the wages paid 100 or 200 years ago seem, compared with the rates of our days, very low, the spinners were paid relatively much better than the workers in other professions such as the blacksmith, shoemaker, baker, etc. Today the salaries of the spinners are less than those paid in many branches, especially when compared with the salaries of the metal workers.

In 1830 the great part of the workers of a spinning mill were girls and boys from eighteen years to eleven years and even to eight years. This was a great improvement when compared with the conditions prevailing 100 years ago in the time of Lewis Paul or further back in the 17th century where everyone, regardless of age and sex, worked from the early morning to late at night. Such conditions

* "International Cotton Bulletin," No. 61, Vol. XVI, 1937, p. 173.

seemed to be quite natural in those days. It must be pointed out that those conditions regarding the employment of very young workers, even children, was known before the introduction of the factory system in general and the spinning machine in particular. From a patent Nr. 202 in 1678 of Dereham and Haines regarding a new spinning engine we hear "... that a child of five or foure yeares of age may doe as much as a child of seven or eight yeares old ..."

Another point to be noted is the reduction of hours worked. In the middle of the 18th century there was practically no limit, at the beginning of the 19th century it was 69 hours per week, then 64 hours per week, and at the beginning of the 20th century it was reduced further to 56 hours per week; now it is only 48 hours per week, in France even only 40 hours per week. The reduction was not only the result of hard social struggles, but also of the fact that increasing efficiency of the machinery permitted it. Of course, there will be a limit to the reduction of the working time since mankind can expect results only when hands and brains are bestirred. The question is not to work more or less, but to produce cheaper as a whole and thus to reduce prices, allow an increase in consumption, an increased sale and production. And, finally, it is not leisure but work which makes for happiness.

GENERAL OUTLOOK.

‡ The spinning machine of 1938 has developed largely out of the spinning machine of 1738 and out of the patent of Lewis Paul in particular. The present spinning machine is based on the principle that the raw material for spinning is stapled material such as wool and cotton, which form the bulk of the present textile materials. But the present spinning machine is also applicable for the spinning of cut rayon which is coming into use now in considerable quantities.

For the use of synthetic materials such as cut rayon staple fibres, the question arises as to whether this material should be cut or not, since when leaving the spinning machine in the rayon mill, the fibre forms a continuous strand which is capable of being woven directly and without any further spinning process. To cut the continuous rayon fibre into small fibres and to spin them again to a continuous thread means waste of time, energy and increased costs. When this roundabout way is abandoned our present spinning machines might become obsolete.

Of course it can only be conjectured whether, and if so, how this change will be a reality one day. Yet we must face the aforementioned possibility when speculating upon the future of the spinning process in general and to the spinning machine in particular. There have been so many changes during the last 200 years that we dare not say that a further change might be impossible; the question of the new synthetic materials delivered by the rayon mill in a continuous thread might change the whole position. Now our system of spinning seems to be more or less perfect, especially our spinning machines. Yet already some 100 years ago a famous English poet knew that "... Things may serve long—but not serve ever. ..."



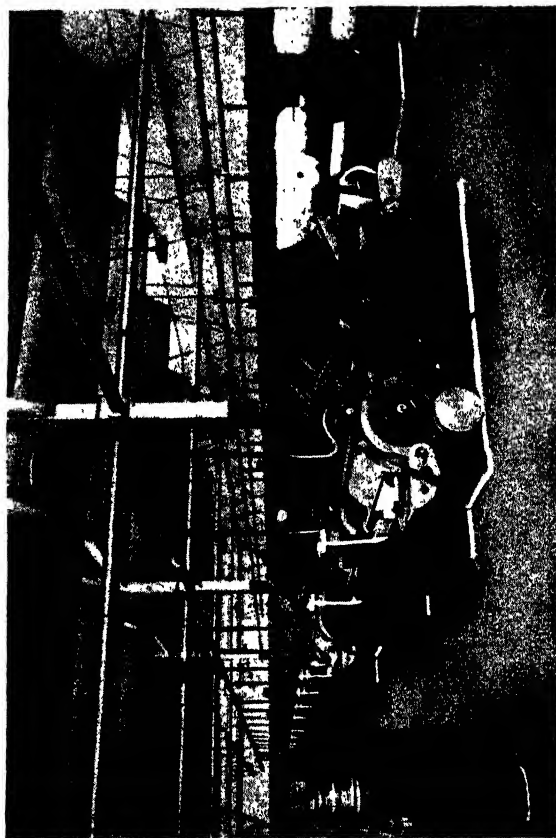


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THE CZECHO-SLOVAK AND THE SUDETEN COTTON TEXTILE INDUSTRIES

Information received at the Head Office of the International Cotton Federation from its affiliated associations in Prague and Reichenberg (Sudetengau) indicates that approximately 1,500,000 cotton spindles have been transferred during the cession of the Sudeten area to Germany, leaving in the present state of Czecho-Slovakia 1,621,000 cotton spindles. Of these spindles, 61,000 are at the moment idle and 170,000 are spindles usually engaged in the production of Egyptian or Egyptian-type yarns. We are informed that these figures are correct to within 1 to 2 per cent.

As regards the weaving section, of the 104,000 looms within the boundaries of Czecho-Slovakia prior to the cession of the Sudeten area to Germany, 34,000 of these looms, owned by approximately 200 firms, are in the area ceded to Germany.

The cotton-waste spinning section of Czecho-Slovakia is practically all situated in the Sudeten area. Two of the four rayon concerns originally established in Czecho-Slovakia are also situated in the Sudeten area, but those situated at Senica and Baticovce remain in Czecho-Slovakia. The majority of rayon weaving mills are still situated in Czecho-Slovakia but, on the other hand, the pure silk industry, is in the main, located in the Sudeten area. We understand that practically the whole of the textile printing industry remains in the new Czecho-Slovak state.

Four towns chiefly occupied with woollen spinning remain in Czecho-Slovakia; whereas a large proportion of this industry is in territory which has been transferred to Germany. On the other hand, the woollen weaving industry, and also the linen weaving industry, are chiefly situated in Czecho-Slovakia.

A large number of the knitting firms and especially the cotton and glove factories are situated in the Sudeten area. Almost the whole of the knitting industry and practically all the gold lace factories are in an area which has now become part of Germany. There were originally two tulle factories in Czecho-Slovakia, one of which remains in Czecho-Slovakia; the other will be in the ceded area.

In regard to the carpet industry, most of the firms engaged in the manufacture of wool carpets, furnishing materials and the webbing manufacturers are in the Sudeten area. Fully 80 per cent. of the knitting and crochet yarn manufacturers and the coconut matting manufacturers are also in the Sudeten area.

THE COTTON INDUSTRY OF YUGOSLAVIA

The following information is contained in a report upon Economic and Commercial Conditions in Yugoslavia prepared by the Commercial Secretary to H.M. Legation at Belgrade. The report is published by the Department of Overseas Trade and is obtainable from H.M. Stationery Office. Price 1s.

The Yugoslav cotton industry, which is very highly protected, now supplies the greater part of the country's requirements in cotton tissues. Generally speaking, the only cotton tissues now imported are those of relatively high quality. There are some 70 cotton mills in the country with approximately 200,000 spindles and 12,000 looms.

There has been a marked increase in activity in the cotton spinning industry of late years. The counts mainly produced are those from 10 to 40.

In the absence of reliable statistics of production, the best indication of the development of the industry can be obtained by reference to the section dealing with the imports of cotton.

The net yield of the Yugoslav cotton crop is now about 200 tons; owing to measures taken to assist the growers, production is increasing steadily. Over 6 tons of cotton seed was sown in 1938, over a total area of 4,119 hectares, as against 3,200 hectares in 1937. Cotton manufacturers are obliged to purchase the whole of the Yugoslav crop at prices fixed yearly, and usually greatly in excess of world parity. A special tax is levied on imports of cotton in all forms, the proceeds of which form a fund employed for the advancement of Yugoslav cotton production.

THE ARGENTINE COTTON INDUSTRY

The following information is extracted from the Report on Economic and Commercial Conditions in the Argentine Republic, April, 1938, prepared by the Commercial Counsellor to the British Embassy in Buenos Aires. The report is printed and published for the Department of Overseas Trade by H.M. Stationery Office, London. Price 3s. 6d. net.

The Argentine textile industry is passing through a critical period as a result of overproduction in many bulk lines. In some cases prices have been reduced to unremunerative levels by excessive competition and a number of manufacturers have failed, including several important firms. In view of the uncertain outlook, coupled with over-buying of raw materials, more failures are likely to occur in the textile industry in 1938.

The local cotton spinning industry in recent years has been featured by a steadily increasing production with a strong tendency towards the manufacture of finer counts. Approximately 320,000 spindles are now installed, and nearly all of them were working 76 to 80 hours a week during most of 1937, the total output in that year exceeding 37,000 tons,

an increase of 12,000 tons over 1936. In carded yarns the entire home requirements up to 40's are supplied by Argentine spinners, the average count spun locally being between 14 and 18. Several factories have put in combers, and, though the output is small as yet, a fairly good quality Argentine combing ring yarn as fine as 40's, if not 50's, can be purchased today. One or two firms have experimented with mercerised yarns. Towards the end of 1937 the demand from local weavers slackened unexpectedly, and the spinners accumulated stock, of which they endeavoured to dispose by cutting prices to a point below cost. A serious attempt is now being made to regulate production by the allocation of monthly quotas to each spinner, with penalties for infringement, under the supervision of a first-class firm of chartered accountants. It is believed that the limitation of production will improve margins without the necessity of definite price agreements. Pending establishment of the quotas some spinners are shutting down one or one-and-a-half days per week. In the circumstances it is improbable that any more spindles will be installed for some years.

In 1937 there was a further striking expansion in the cotton piece-goods industry and many of the larger mills were extended, the capacity of one of the most important being tripled. The rapid progress made in the past four years is demonstrated by the following estimates of the number of looms in operation :—

1934	..	..	..	3,000
1935	..	..	..	3,700
1936	..	..	..	4,000
1937	..	..	..	4,500

Owing to the greater efficiency of the mills and the introduction of more automatic looms, the upward curve of the production of tissues is sharper still, having risen in 1937 to 20,000 tons, which is double the 1935 figure and 40 per cent. higher than that for 1936. Last year, however, the industry suffered a financial set-back, mainly owing to the high price of Argentine raw cotton consequent on the failure of the 1936-37 crop, and the uncertain prospects for the next.

FIVE-YEAR PLAN FOR TURKISH COTTON INDUSTRY

The following is extracted from an article, which recently appeared in the *Manchester Guardian Commercial* :—

The Turkish State is playing a leading part in building up the textile industry, with the aim of achieving complete self-sufficiency in textiles. The five-year plan started in 1934 aims at the systematic development of cotton and woollen production and manufacture. The number of cotton spindles has increased from 94,000 in 1932 to 232,000 in 1937, and the number of cotton looms from 1,200 to 4,680.

Under the five-year plan six cotton spinning and manufacturing mills have been erected, with an aggregate capacity of 120,200 spindles and 3,100 looms, employing 9,260 workers. The bulk of the machinery for these mills has been obtained from Germany, though the first supplies came mainly from Russia. The principal cotton mill in Kayseri, with 32,500 spindles and 1,080 looms, was built out of a credit for twenty years, free from interest of 10,000,000 gold dollars from Soviet Russia. In consequence of the difficulties which were experienced in equipping this mill, the complicated machinery for the second one, at Nazilli, was obtained from German firms.

The production of the State mills was set at 1,267.5 tons of cotton yarn and 9,154 tons of cotton piecegoods for 1938. In addition the private mills are expected to produce 6,650 tons of yarn and 4,235 tons of piecegoods. These figures show that the principal attention has been paid in the industrial planning to progress in weaving, which was far behind yarn production up to 1934. It is intended also to extend the production of cotton yarn; thus a new spinning mill is being put up at Erzeroum with 10,000 spindles.

In consequence of the great increase in cotton cultivation, the offer of cotton exports will remain large, in spite of increased requirements since the erection of the State mills. The 1927 crop totalled 38,905 tons, and the 1937 crop about 60,000 tons. There are still opportunities of great extension of the cotton cultivation. According to details published by the *Frankfurter Zeitung* there are 800,000 hectares available year by year for cotton cultivation in the district of Adana alone, out of a total of 1,600,000 in all Turkey. The area in the Adana district is thus approximately equal to that of Egypt, though the yield differs greatly.

In recent years exports of Turkish cotton have greatly increased, from 5,097 tons in 1933 to 22,785 tons in 1936. Germany is the principal buyer, taking 71 per cent. of the crop in 1936. Turkish cotton is also making headway in Hungary, Poland, and Roumania.

THE FORTY-HOUR WEEK IN FRANCE : FURTHER MODIFICATIONS

In pursuance of its policy of simplifying and rendering more elastic the methods of applying the forty-hour week legislation, and of increasing the facilities for working overtime in exceptional circumstances, the French Government has recently issued a number of Decrees, the main provisions of which are summarised below.

Simplification of Procedure.—A Decree-Law was signed on June 21, 1938, by the French President and members of the Cabinet, amending, in the interest of greater speed and simplicity, the procedure laid down in the Forty-Hour Week Act dated June 21, 1936, for the drafting of regulations applying the reduced working hours. The Act requires that the issue of such regulations must be preceded by consultation with the competent section or sections of the National Economic Council, an

advisory body comprising sections representative of the various branches of industry. This procedure is considered to be too cumbrous, especially when regulations of a general character are in contemplation, and the Decree-Law accordingly substitutes for detailed consultation with the sections of the National Economic Council reference to the Standing Committee of that body. The Decree-Law was issued in virtue of special legislative powers temporarily conferred upon the Government and will require subsequent ratification by Parliament.

Additional Facilities for Overtime.—Two Decrees dated August 6, 1938, give practical effect to the recommendations of the Committee of Inquiry into Production as regards additional allowances of overtime in industries suffering from a shortage of skilled labour and in certain key industries which have reached the limit of their productive capacity under existing conditions.

The first Decree provides for 75 hours of overtime a year, in addition to those already permissible, in respect of specified occupations for which a shortage of suitably qualified labour has been proved in the metal, engineering and shipbuilding, hardware and domestic utensils, motor-car body building, watch and clock, optical instrument, and certain other industries. The additional working time, which is subject to payment at increased rates, may not exceed three hours a week nor one hour a day. Each undertaking which proposes to have recourse to the additional overtime must obtain the sanction of the Labour Inspector, opportunity being given to the workers' organisations concerned to notify the existence of any suitable available labour.

The second Decree authorises undertakings in specified branches of industry, the activity of which is a determining factor in important sections of national production, to apply to the Inspector of Labour for permission to work, during 1938, 50 hours of overtime after the exhaustion of the overtime permitted under other regulations. This additional overtime may not exceed one hour a day, and must be remunerated at increased rates. The specified branches of industry include the manufacture of machine tools, and of machinery and plant for works of construction and for the textile, paper and printing, food and chemical industries.

Future Government Policy.—In a broadcast message to the French nation on August 21, 1938, the Prime Minister, M. Daladier, foreshadowed important modifications in the working-hours legislation. He declared that, in view of the present situation in Europe, it should be possible in France for work in the interests of national defence to be carried on for 48 hours a week, if necessary, and, further, that any undertaking in which overtime was necessary should be able to extend working hours without unnecessary formalities and protracted discussions, and without having to pay exorbitant overtime rates; overtime rates, he considered, should not, on average, exceed 10 per cent. above normal wage rates.

On August 30, 1938, a Decree was signed by the French President and countersigned by all members of the Cabinet giving partial effect to the policy enunciated by the Prime Minister. The first article of the

Decree reiterates the provision, appearing in the existing regulations applying the forty-hour week, by which the Government may order the extension, by the amount deemed necessary, of hours of labour on work in the interests of national defence and safety or of the public service. In a statement published with the Decree, it is explained that this article is designed to emphasise the determination of the Government to utilise the powers which it already possesses to extend working time in the circumstances in question. Further provisions of the Decree authorise the Minister of Labour, after consultation with the employers' and workers' organisations, to grant permission to undertakings or groups of undertakings, in industry generally, to work 100 hours of overtime a year, additional to those permissible under existing regulations (in general, 75 hours a year) during periods of exceptional pressure of work which cannot be dealt with by the normal staff or by the engagement of extra workers.

It is announced that the issue of a Decree is contemplated which will further simplify and accelerate the procedure for extending working hours, and that draft legislation will be submitted to the next session of Parliament authorising a reduction of the rates of overtime pay laid down in collective agreements. *(Ministry of Labour Gazette)*

MEXICO

According to information contained in a recent issue of *Commerce Reports*, published by the U.S. Dept. of Commerce, the Mexican cotton textile industry worked on a reduced basis, with more petitions being presented by smaller factories desiring to reduce operating hours.

The proposed general labour contract for a 34-hour week in the cotton textile industry has not yet been agreed upon, but the employer-labour convention has been prolonged in the effort to bring the various factions together.

COLOMBIA

Cotton textile mills in Medellín have expanded their capacity considerably in the last two years and rough estimates (obtained from unofficial sources) indicate that the mills now have about 75,000 spindles and 3,000 looms. Additional textile machinery to the value of about \$1,500,000, United States currency, was reported to have been purchased in the United States during 1937. Most machinery in the textile mills is American, the exception being dyeing equipment which is nearly all of German origin. Medellín is located in the Department of Antioquia, which is not an important cotton-growing district; its cotton textile mills obtain their cotton mainly from the departments of Tolima and Atlántico in Colombia and from the United States.

(U.S. Dept. of Commerce)

USE OF KOTONIN BY POLISH TEXTILE INDUSTRY

The Polish Ministry for Trade and Industry has issued a decree regulating the use of Kotonin (cottonised bast fibre) in the textile industry. It requires the spinning mills to utilise 400 tons of Kotonin per month. The Association of Cotton Yarn Producers in Lodz has been empowered to allocate this volume and to determine the counts of yarn which are to be made with an admixture of Kotonin.

INCREASE OF JAPANESE SPINDLAGE IN CHINA

In the near future the Japanese cotton mills in Shanghai are to increase their equipment by 1,000,000 spindles. Of the fifty-three Japanese cotton mills in China, thirty-two are in the Shanghai district alone, and have suffered great damage owing to the warfare in the vicinity ; not less than 700,000 spindles are estimated to have been damaged or destroyed.

JAPAN: COTTON CONTROL

Since July 1, a greatly changed system of cotton industry and trade control has been in operation in Japan. Its features are the linking of raw cotton import privileges to actual sales of cotton manufactures abroad by exporters and the internal prohibition of goods that are made wholly of cotton. The control measure that had been in force since the time of the China outbreak was discarded owing to various weaknesses which had developed in regard to the distribution and price movements of cotton goods.

The new system requires that all cotton piecegoods for export must be manufactured by spinning concerns or by the mills belonging to the Japan Cotton Textile Industry Association for the account of such concerns, before being exported by the spinning companies. Based on the volume of such exports by individual spinners the Government bestows on them the privilege of importing a certain amount of raw cotton. At the same time, a special company is to be organised for the benefit of makers of knit goods, miscellaneous goods and cutters-up, which are mostly small enterprises, and will be charged with the task of distributing cotton yarn and purchasing other raw materials, thereby eliminating the chances of an outlaw seepage of these materials into the domestic market. The maximum prices for goods for export are abolished.

This monopolistic position as cotton goods maker and exporter has been given to the spinners with the sole idea of checking the inflow into domestic consumption of all-cotton goods that are intended for export. Past experience established the fact that such goods found their way into domestic consuming channels on a most liberal scale, largely because all-cotton yarns were distributed among numerous small weavers over whom it was out of the question to exercise strict control as regards disposal of the goods. The new system holds the spinners entirely responsible at all stages of cotton goods manufacture for export purposes, from the acquisition of raw cotton through the yarn spinning and cloth weaving to the actual exportation. This arrangement reduces the weavers to the status of hired workers who do the work for a consideration and without the opportunity for profit-making which they enjoyed when the activity was conducted on their own account. The simplified system of control, it is felt, will do away entirely with the past evil of pure cotton goods leaking into domestic consumption.

At the same time the link system ought to prove a double insurance against outlaw distribution. Spurred by the money-making motive and a desire to increase the scope of their manufacturing operations, the spinners will increase their efforts to develop exports and thereby automatically do away with any chances of leakage that might exist. Moreover, this link system may have the added virtue of encouraging the conclusion of forward business in cotton manufactures, as the system allows the spinners to form some idea about their raw material position on which to base their calculations and snap up business for forward delivery. The conclusion of forward business in many cases should automatically spur the spinners to still further efforts for export.

In this connection, the belief is held that in unison with increasing export movement of cotton manufactures the outlook is for an accelerated inflow of raw cotton, the raw material. This is believed to be doubly true in view of the very diminished stock position here. To prevent any part of the prospective cotton imports from being diverted to domestic consumption, and to make sure that the whole tonnage is devoted to the export industry, a rigid ban has been placed on the domestic sale of all-cotton goods except those needed for national defence purposes and a few other uses. While the maximum price system for exportable goods has been abolished, a Commerce Department decree forbids the sale of all textile goods other than silk at prices higher than the level of June 28. With a view to effecting compulsory storage, the Government ordered the Japan Cotton Spinners' Association and the Cotton Cloth Wholesalers' Association to buy up all the stocks remaining in the hands of commission merchants and department stores. To avoid any possible confusion due to the prohibition against the use of pure cotton, the manufacture and finishing and dyeing of staple fibre mixed piecegoods have also been banned for about one month. This prohibition of cotton piecegoods notwithstanding, the authorities estimate that there are sufficient stocks in most homes to take care of clothing needs for two or three years to come without an acute necessity of replenishment.

(Oriental Economist)

CHILE

The domestic textile industry produces approximately 90 per cent. of Chile's requirements of wool textiles and 60 per cent. of the cotton textiles consumed. The country has *nine wool textile mills*, of which three are in Concepcion, four in the nearby town of Tome, one in Vina del Mar, and one in Santiago. There are also a few wool spinning mills. The distribution of the *nineteen cotton textile mills* in the country, according to the Chilean Bureau of Statistics, in 1937, was as follows :—Santiago, thirteen mills; Valparaiso, four; Vina del Mar, one; and Concepcion (Chiguayante), one. In addition, Chile has about *sixty knitting mills*, making a variety of knit products; these mills have 500 to 600 flat knitting machines and more than 1,200 circular knitting machines. Rayon weaving and knitting is a comparatively recent manufacturing enterprise in Chile, but the industry has shown remarkable growth during the last three years. Imported yarns are used. In 1936, there were about *forty silk and rayon weaving mills* with 660 looms, but there are said to be about 800 looms now producing rayon goods. Production in 1936 of silk and rayon piecegoods was placed at 3,260,000 meters (of 1·0936 yards each), of which about a tenth was printed goods.

The number of looms in the Chilean cotton and wool weaving industries and the production of cloth were as follows in the past four years, according to the Chilean Bureau of Statistics :—

Year	Wool Industry		Cotton Industry	
	Number of looms	Production in meters	Number of looms	Production in meters
1934	625	2,794,114	1,389	7,128,700
1935	712	3,915,403	1,319	8,915,400
1936	741	4,210,002	1,533	11,987,121
1937	768	3,808,693	2,083	19,847,251

(U.S. Department of Commerce)

CANADA

Production in the Canadian textile industry remains considerably below the average for the September quarter of the past four years, according to an article in the September 2 issue of *The Canadian Textile Journal*. There has been some recovery since the middle of July in mill operations. The most marked expansion of production in any section of the industry has occurred in rayon yarns and fabrics, the output of which is currently approaching normal, following a contraction estimated at about one-third for the first half of 1938, as compared with the corresponding period of 1937. Cotton mill operations increased during August, but were still from 20 to 25 per cent. below normal. The decline in Canadian cotton mill activity has been greater than the decrease in imports,

according to the press report, which states that domestic production fell off $24\frac{1}{2}$ per cent. and imports of cotton manufactures decreased 18 per cent. during the first half of 1938, as compared with the like period of 1937. Although total imports of cotton piecegoods into Canada during the first half of 1938 fell off, imports from the United States increased more than 50 per cent.

The following are comparative figures for cotton consumption :—

		500-lb. Gross Bales		Index	
		1938	1937	1938	1937
January	..	18,437	21,201	117·6	135·3
February	..	16,649	22,441	102·6	138·2
March	..	19,985	25,956	128·7	167·1
April	..	18,913	25,966	104·9	143·9
May	..	18,860	24,966	108·6	143·7
June	..	18,057	26,489	104·8	153·7
July	..	15,226	22,345	93·9	137·8
August	..	17,363	8,993	107·5	55·7
Eight months		137,490	178,357	—	—



COTTON TRADE STATISTICS

IMPORTS AND EXPORTS OF RAW COTTON BY COUNTRIES AUGUST 1st TO JULY 31st.

(Statistics compiled by the International Institute of Agriculture.)

(TWELVE MONTHS August 1—July 31)

COUNTRIES	Exports		Imports	
	1937-38	1936-37	1937-38	1936-37
Thousand cents (1 cental = 100 lb.).				
<i>Exporting Countries :</i>				
United States	29,884	28,443	795	1,265
Haiti	(a) 102	(a) 120	—	—
Dominican Republic	3	2	—	—
Argentina	234	675	—	—
Brazil	(c) 3,158	(c) 3,167	—	—
Peru	(a) 1,266	(a) 1,522	—	—
Burma	436	(e) 83	0	(e) 0
China	1,955	1,213	181	504
India : by sea (f)	8,252	17,244	3,132	1,979
" by land (f)	—	(b) 7	—	—
Netherlands Indies :				
Java and Madura	11	28	—	—
Outer provinces	(a) 49	(a) 83	—	—
Iraq	84	40	5	3
Iran	415	388	0	0
Syria and Lebanon	53	81	0	0
Turkey	479	321	—	—
Egypt	(a) 7,970	(a) 8,450	—	—
French Morocco	0	0	1	1
<i>Importing Countries :</i>				
Germany (g)	0	2	6,914	5,779
Austria (g)	0	1	832	871
Belgo-Luxemb., E. U.	841	757	2,733	2,936
Bulgaria	0	0	258	193
Denmark	—	—	190	204
Spain	—	—	—	—
Estonia	0	0	133	132
Finland	1	1	234	299
France	386	412	6,779	6,957
Greece	(b) 0	(b) 0	(b) 58	(b) 55
Hungary	0	0	500	552
Italy	0	0	3,673	3,598
Latvia	0	0	113	115
Lithuania	0	0	55	43
Norway	0	0	67	75
Netherlands	13	16	1,198	1,360
Poland-Danzig	2	2	1,772	1,636
Portugal	—	—	645	555
Roumania	(c) 0	(c) 0	(c) 284	(c) 232
United Kingdom	499	609	15,294	15,885
Sweden	—	—	711	754
Switzerland	3	5	718	715
Czechoslovakia	45	53	1,982	2,516
Yugoslavia	1	2	482	410
U.S.S.R.	(b) 439	(b) 189	(b) 495	(b) 408
Canada	—	—	1,400	1,680
Colombia	—	—	(b) 73	(b) 56
Ceylon	0	0	20	20

IMPORTS AND EXPORTS OF RAW COTTON—*continued*

Chosen	..	..	..	(a) 0	(a) 0	(a) 381	(a) 30
Taiwan	..	..	..	—	—	(c) 3	(c) 9
Indochina	..	..	..	(a) 8	(a) 17	(a) 206	(a) 252
Japan	..	..	..	(b) 106	(b) 598	(b) 7,856	(b) 19,046
Manchukuo	..	..	..	(d) 0	(d) 0	(d) 308	(d) 246
Palestine	..	..	..	0	0	15	12
Algeria	..	..	..	5	2	6	5
Union of South Africa	..	..	..	(b) 4	(b) 5	(b) 25	(b) 9
Australia	..	..	..	0	0	151	52
Totals	..	..	..	56,705	64,538	60,768	71,449

(a) Up to June 30. (b) Up to May 31. (c) Up to April 30. (d) Up to December 31. (e) From April 1, 1937. (f) From April 1, 1937, the Indian statistics include the trade of India with Burma, and exclude the direct trade of Burma with foreign countries. (g) From April 1, 1938, not including trade between Germany and Austria.

DETAILED STATEMENT of the QUANTITY (in pounds) and the COUNTS (or numbers) of YARN Spun (Concluded).
GRAND TOTAL, INDIA (British India and Indian States).

Count or Number	TWELVE MONTHS, APRIL TO MARCH		
	1935-36	1936-37	1937-38
1	3,880,361	2,823,704	4,079,765
2	11,087,430	8,516,093	8,097,121
3	2,157,812	1,840,763	1,669,991
4	7,711,286	7,755,658	8,358,340
5	3,462,712	4,169,284	3,892,562
6	8,160,496	8,178,953	9,832,137
7	20,823,105	22,817,630	20,858,656
8	11,291,706	11,691,055	12,107,080
9	19,340,795	20,471,817	18,891,393
10	22,798,196	23,427,800	25,884,525
TOTAL, Nos. 1 to 10	110,713,899	111,692,937	113,671,570
11	38,622,193	37,636,395	37,719,657
12	32,688,584	29,576,048	35,348,562
13	31,252,636	32,496,683	27,387,822
14	44,240,376	51,374,723	51,080,052
15	24,941,820	24,420,680	23,659,426
16	38,775,574	42,022,803	43,392,870
17	20,667,505	15,323,542	17,142,498
18	38,399,823	35,687,386	29,660,885
19	16,230,463	18,729,194	21,265,029
20	194,387,287	189,699,433	206,716,965
TOTAL, Nos. 11 to 20	480,206,261	476,966,877	494,273,766
21	43,312,798	38,826,308	44,912,313
22	50,584,270	48,291,324	48,958,314
23	11,395,730	12,269,701	13,081,234
24	49,168,366	41,956,812	46,776,597
25	7,204,999	6,646,654	9,563,856
26	24,608,572	25,285,153	24,792,686
27	2,626,889	1,703,034	2,357,767
28	19,541,722	17,061,809	18,544,375
29	6,420,564	5,357,259	5,885,973
30	72,880,850	71,350,097	90,939,757
TOTAL, Nos. 21 to 30	287,744,760	268,678,211	302,812,782
31	2,089,837	2,203,291	3,683,427
32	24,299,863	26,281,748	28,542,974
33	751,747	471,647	375,808
34	5,687,253	5,170,996	4,263,047
35	3,200,583	2,026,326	4,325,955
36	4,975,999	5,969,733	8,749,901
37	1,221,970	1,509,803	1,112,391
38	5,371,207	8,291,777	11,087,222
39	449,765	553,599	1,262,104
40	64,201,035	70,435,622	89,061,308
TOTAL, Nos. 31 to 40	112,339,259	123,007,542	152,455,137
Above 40	58,528,164	61,851,698	85,112,656
Wastes, etc.	6,083,340	8,403,461	11,186,696
GRAND TOTAL	1,055,615,683	1,050,600,726	1,169,512,607

DETAILED STATEMENT of the QUANTITY (in pounds and their equivalent in yards) and DESCRIPTION of WOVEN GOODS Manufactured (Concluded).

GRAND TOTAL INDIA (British India and Indian States).

Description		TWELVE MONTHS, APRIL TO MARCH		
		1935-36	1936-37	1937-38
<i>Grey and Bleached piecegoods—</i>				
Chadars	{ pounds	23,688,903	26,742,040	27,577,620
	{ yards	59,459,392	65,874,990	66,938,314
Dhutis	{ pounds	234,221,282	219,768,310	227,945,918
	{ yards	1,240,510,752	1,117,737,083	1,215,345,358
Drills and jeans	{ pounds	32,136,569	35,786,610	39,253,555
	{ yards	128,898,928	136,535,387	152,896,435
Cambrics and lawns	{ pounds	16,191,679	15,977,891	24,549,639
	{ yards	129,690,723	123,774,104	192,878,144
Printers	{ pounds	2,944,017	2,923,383	4,657,442
	{ yards	15,973,248	14,710,688	23,312,944
Shirtings and long-cloth	{ pounds	182,246,590	194,908,662	226,093,878
	{ yards	842,843,691	900,680,257	1,084,830,608
T-cloth, domestics, and sheetings	{ pounds	38,836,445	45,183,043	47,966,242
	{ yards	152,072,567	170,530,913	191,331,889
Tent-cloth	{ pounds	3,046,110	3,958,324	5,256,276
	{ yards	7,488,852	9,718,387	12,210,733
Khadi, Dungi or Khaddar	{ pounds	37,751,012	39,652,608	38,638,262
	{ yards	116,406,563	126,440,306	126,312,260
Other sorts	{ pounds	16,860,329	19,634,847	25,246,163
	{ yards	80,147,212	95,763,357	124,281,707
TOTAL	{ pounds	587,922,936	604,535,718	667,184,095
	{ yards	2,773,491,928	2,761,765,472	3,190,647,392
<i>Coloured piecegoods.</i>	{ pounds	152,872,906	154,663,112	169,197,040
	{ yards	797,878,975	810,221,627	893,628,971
<i>Grey and Coloured goods, other than piecegoods</i>	{ pounds	5,119,105	5,144,770	6,158,207
	{ dozens	1,291,250	1,188,139	1,517,358
<i>Hosiery</i>	{ pounds	4,809,937	5,964,268	7,496,087
	{ dozens	1,440,599	1,883,486	2,445,619
<i>Miscellaneous</i>	{ pounds	5,673,448	5,577,656	6,013,110
<i>Cotton goods mixed with silk or wool.. ..</i>		4,676,151	5,928,016	8,155,602
GRAND TOTAL	{ pounds	761,074,683	781,813,540	864,205,041
	{ yards	3,571,370,903	3,571,987,099	4,084,276,363
	{ dozens	2,731,849	3,071,625	3,962,977

IMPORTS OF RAW COTTON INTO BRITISH INDIA

Country of origin		Weight in Long Tons	
		1936-37	1937-38
Kenya		35,925	47,710
United States		927	29,198
Egypt		18,546	28,347
Anglo-Egyptian Sudan		4,086	18,763
Tanganyika		4,143	7,504
All others		1,361	2,892
Total		64,988	134,414

(Textile Raw Materials)

EXPORTS OF COTTON FROM BRITISH INDIA

Country of Destination	Quantity in long tons April 1—March 31	
	1936-37	1937-38
United Kingdom	111,147	70,554
Belgium	55,694	35,151
Germany	38,925	29,758
Italy	29,493	27,137
France	27,638	16,913
Netherlands	9,054	8,033
Poland	8,640	7,078
Bulgaria	1,932	2,214
Greece	1,452	991
Portugal	1,462	683
Spain	4,643	—
Japan	433,223	242,695
China	12,871	12,288
Indochina	4,474	2,132
Ceylon	734	903
United States	16,371	13,435
Other countries	4,380	17,545
Total	762,133	487,784*

* The 1937-38 totals include "for orders" cargo amounting to 274 tons.

(United States Department of Commerce)

IMPORTS OF COTTON YARNS AND PIECEGOODS INTO INDIA

Figures for the Fiscal Year, April 1, 1937, to March 31, 1938. (Prepared by H.M. Senior Trade Commissioner in India, and published by the Department of Overseas Trade, London.)

Cotton Yarns.—The reduction in the aggregate trade from 28.5 million lbs. to 22 million lbs. in quantity, and from Rs.2.55 lakhs to Rs.2.50½ lakhs in value, shows the effects of a considerable increase in price notably in the case of Japanese yarns. The imports from the United Kingdom fell from 7.6 million lbs. valued at Rs.79 lakhs to 6.6 million lbs. valued at Rs.77¼ lakhs. Imports from Japan were reduced in quantity from 15.8 million lbs. to 14.6 million lbs., but rose in value from Rs.1.37 lakhs to Rs.1.68¼ lakhs. Arrivals from China were practically eliminated amounting only to 527,000 lbs. valued at Rs.3 lakhs.

Grey Piecegoods (Plain Grey).—There was a very heavy fall in the aggregate trade from 167½ million yards valued at Rs.2.02½ lakhs to 93½ million yards valued at Rs.1.31 lakhs. The fall was mainly attributable to reduced imports from Japan, whose shipments declined from 155½ million yards valued at Rs.1.83½ lakhs to 84½ million yards valued at Rs.1.15 lakhs. Arrivals from the United Kingdom were reduced from 12 million yards (Rs.19 lakhs) to 9 million yards (Rs.16 lakhs).

Grey Piecegoods (Bordered Grey).—The effect of the rapidly increasing production of dhooties in Indian mills is clearly shown in the decline in the aggregate trade from 94¼ million yards valued at Rs.1.35 lakhs to 39½ million yards valued at Rs.59 lakhs. Imports from the United

Kingdom fell from $41\frac{1}{2}$ million yards (Rs.73 lakhs) to 15 million yards (Rs.28 $\frac{1}{2}$ lakhs) while shipments from Japan were reduced from 53 million yards (Rs.62 lakhs) to $24\frac{1}{2}$ million yards (Rs.30 $\frac{1}{2}$ lakhs).

White Piecegoods (Bleached).—There was a decline in the imports of these goods from 219 $\frac{3}{4}$ million yards valued at Rs.4.49 lakhs to 202 $\frac{1}{4}$ million yards valued at Rs.4.18 lakhs. This reduction was almost entirely borne by the United Kingdom, the share of which fell from 164 million yards (Rs.3.45 lakhs) to 128 $\frac{3}{4}$ million yards (Rs.2.82 lakhs). On the other hand, imports from Japan rose from 48 million yards (Rs.74 $\frac{1}{2}$ lakhs) to 65 million yards (Rs.98 lakhs). Arrivals from Switzerland rose from 5 million yards (Rs.20 lakhs) to 6 million yards (Rs.27 $\frac{1}{4}$ lakhs). Imports from the Netherlands however fell from 1.6 million yards (Rs.4.5 lakhs) to 1.2 million yards (Rs.3.5 lakhs).

Printed Piecegoods.—The total trade declined from 188 million yards valued at Rs.3.01 lakhs to 153 million yards valued at Rs.2.67 lakhs. Imports from the United Kingdom were only slightly reduced from 50 million yards (Rs.1.09 lakhs) to 48 million yards (Rs.1.07 lakhs). Arrivals from Japan however receded from 138 million yards (Rs.1.92.3 lakhs) to 103 million yards (Rs.1.54 lakhs).

Dyed Piecegoods.—The aggregate trade rose from 81 million yards (Rs.2.09 lakhs) to 91 million yards (Rs.2.55 lakhs). Imports from the United Kingdom were slightly reduced in volume from 63.4 million yards to 62.5 million yards but, owing to increased prices, rose in value from Rs.170.7 lakhs to Rs.192.7 lakhs. Arrivals from Japan advanced from 13 million yards (Rs.23 lakhs) to 23 million yards (Rs.41 lakhs); those from Switzerland from 2.8 million yards (Rs.9 lakhs) to 3.2 million yards (Rs.12.3 lakhs). Arrivals from Italy were 627 thousand yards (Rs.2.7 lakhs).

Woven Coloured Piecegoods.—There was a substantial reduction in quantity from 13.8 million yards to 10.9 million yards and a slight reduction in value from Rs.39.6 lakhs to Rs.39.2 lakhs. Arrivals from the United Kingdom rose slightly from 3.49 million yards (Rs.14.7 lakhs) to 3.52 million yards (Rs.15.7 lakhs). Imports from Japan dropped from 9.8 million yards (Rs.22.3 lakhs) to 6.9 million yards (Rs.20.5 lakhs). Arrivals from "other countries" were negligible.

Fents.—The total import of fents of all kinds declined by more than 50 per cent. from 13.6 million yards to 6.2 million yards, and from Rs.98 lakhs to Rs.43 lakhs. This reduction was entirely borne by Japan whose imports fell from 11 million yards (Rs.83 lakhs) to 2 million yards (Rs.17 lakhs). By contrast, imports from the United Kingdom rose from 1.9 million yards (Rs.12 lakhs) to 2.5 million yards (Rs.16 lakhs). Arrivals from the U.S.A. also increased from 590 thousand yards (Rs.3 lakhs) to 1.6 million yards (Rs.10 lakhs).

The import of cotton fents, not exceeding 4 yards in length, declined from 32 million yards to 27.3 million yards, but the value rose slightly from Rs.40.1 lakhs to Rs.40.5 lakhs. The imports of silk, artificial silk, silk mixture or artificial silk mixture fents, not exceeding $2\frac{1}{2}$ yards in length, almost disappeared from 6.9 million yards, valued at Rs.56.3 lakhs, to 316 thousand yards valued at Rs.2 lakhs.

MISCELLANEOUS

NEW USES FOR COTTON

Purchases of cotton and cotton products up to \$250,000 in value for projects to develop new commercial uses for cotton are authorised under the miscellaneous cotton diversion programme for the fiscal year ending June 30, 1939, the Agricultural Adjustment Administration announced recently.

The new programme is similar to and a continuation of the programme in effect last year, under which surplus cotton was diverted from the normal channels of trade for 200 demonstration projects, located in 41 States and the District of Columbia. These projects, involving expenditures of about \$135,000 for cotton materials, included demonstrations of such new uses of cotton as the following :—

As bags for the packaging of wool, walnuts and other agricultural products ; as bagging for cotton bales ; as a lining and reinforcing material for ditches and canals ; as a covering for highway cuts and fills ; as a reinforcing material for airport runways ; as a covering for fruits during growing, ripening and curing processes ; as a covering for cages used in the propagation of insect parasites, and as a roofing and sidewall material in the construction of buildings.

Further demonstrations of these and other similar new uses will be encouraged under the 1938-39 programme. Four additional new uses are suggested for possible development and demonstration during the year. These are : as a covering or protection for fleeces of wool and mohair before clipping ; as a covering for bales of hops ; as a covering material to check or eradicate weeds and other undesirable growths ; and as a material to be used in the construction of traps and containers to prevent injury to birds and animals that are trapped alive.

Demonstrations of new uses for cotton under the diversion programme are carried out in co-operation with State and Federal agencies, agricultural colleges, experiment stations and other non-profit organisations. The projects are limited to uses which have prospects of becoming commercially practicable and of creating a new outlet for a substantial amount of cotton. The programme is under supervision of the Marketing Section, Division of Marketing and Marketing Agreements, A.A.A. Purchases of cotton and cotton products for the projects are made through the Federal Surplus Commodities Corporation.

COTTON versus RAYON TYRE FABRICS IN U.S.A.

The following is extracted from the annual survey of Mr. W. M. Garrard, General Manager of the Staple Cotton Co-operative Association, of Greenwood, Mississippi, which appears in the *Staple Cotton Review* for September, 1938.

"Two years ago, in discussing with one of the principal tyre manufacturers the possibility of substituting rayon for cotton in tyre fabric, I was told by the expert technical chemist of this large tyre company that it was impossible to substitute rayon for cotton in tyre fabric. At great length he explained that rayon could never be used in tyre fabric. And yet, this summer you and I both have seen advertisements made by Goodyear and the U.S. Rubber Company, advertising a tyre made from rayon fabric, which was claimed to be superior to any tyre manufactured from cotton fabric. The advertisements made no statement as to cost of the tyre.

I have here today two tyres on exhibit—one made of cotton fabric and one of rayon fabric. Both tyres were manufactured by one of the major tyre companies. Both tyres are first line tyres. In one of them is used cotton cord, and in the other is used rayon cord. The tyres appear exactly alike, except on one of them is stamped "Rayon." The difference in retail cost of the two tyres is only \$1.55, the rayon tyre being more expensive.

Now, I have been reliably informed that when the rayon tyre was put on the market for pleasure car use, its reception was not what had been hoped by the tyre manufacturers. Their explanation is that first line cotton cord tyres have given satisfactory and superior service, and customers are unwilling to pay more for a rayon tyre. Since the buying public has been getting from cotton cord tyres all the service it expected or desired, the public is not willing to pay a higher price for a rayon cord tyre.

The only superiority claimed by the manufacturer is that a rayon tyre will withstand more heat. On pleasure cars there is rarely, if ever, enough heat generated to make a higher cost rayon tyre desirable. So far rayon tyres have been used almost exclusively on buses, where extreme heat is generated when heavy loads are carried and where the necessity for greater heat resistance is required. We doubt if the rayon cord tyre will supplant the cotton cord tyre on pleasure cars, unless and until it can be produced at the same cost as cotton cord tyres. Much progress has already been made in reduction of cost in rayon manufacturing. It is only logical to assume that as time passes, and manufacturing refinements and skill are increased, rayon may be produced at a cost comparable with the cost of staple cotton. When this occurs rayon cord fabric may then supplant cotton cord fabric. Should this happen it would be exceedingly unfortunate for the Delta, as probably the largest single customer for Delta staples is the tyre trade."

RAYON TYRE FABRIC

According to the *Manchester Guardian*, a British firm of rubber tyre manufacturers announces that it will shortly introduce to the market a tyre for commercial vehicles built on a rayon casing. Hitherto the fabric used as the basis for the outer covers of tyres has usually been made of cotton, 2/22's Egyptian being a yarn much in request for this purpose.

Several months ago, however, after experiments and tests extending over a long time, some manufacturers in the United States began selling tyres made on a rayon basis, and the new tyres are understood to have given especially good results on commercial vehicles, and generally, where heavy work is involved.

The possible outlet for rayon in tyre manufacture is a large one, which rayon can fill only at the expense of cotton, though some traders who have experience of both fibres would probably suggest that the casings of tyres form a more suitable use for rayon than some of those to which it has been put in the furnishing and clothing trades. It is worth noting in connection with changing fashions in textiles for industrial uses that natural silk is being displaced by cotton as a covering for electric wires and cables.

NEW USE FOR COTTON—IN GOLF

A Dundee inventor, Mr. F. E. Williamson, M.A., B.Sc., of Williamson & Co., 37 Nethergate, Dundee, has been granted a patent for synthetic shafts for golf clubs. The new shafts can be made from cotton, jute or other suitable cellulose fibre, impregnated with phenol-formaldehyde resin and reinforced with metal. It is claimed that they combine all the best features of wooden and steel shafts, having the sweetness of hickory and the strength and durability of steel, without any of the disadvantages of either.

The idea of a synthetic shaft occurred to Mr. Williamson when the controversy of hickory versus steel was at its height ; for the last eighteen months he has been working on his idea in secret. (*Textile Mercury*)

COTTON CLOTH WRAPPING FOR MEAT EXPORTS FROM U.S.A.

Press advices from U.S.A. state that a new process of wrapping meat in cloth for shipping, developed by Swift & Company, is expected to create a new market for cotton that will require annually 20 million yards of cotton muslin, according to reports from officials of Swift & Company. After experimenting with the process for two or three years, the company has permanently adopted the method of enclosing veal in cotton cloth for shipping from meat packing plant to retailer. More than eight million yards of the specially prepared cotton muslin were used by Swift & Company in 1937, officials of the company said. The wrapping of cotton cloth is placed on the dressed veal at the packing plant. Outside the cloth the veal is wrapped in a layer of waxed paper and another layer of paper. The process permits dressing the veal in the packing plant before shipping, where formerly it was shipped in the skin. The cloth has been found to help preserve the meat because it prevents collection of moisture and prevents the meat from becoming sticky.

PRODUCTION OF TEXTILE MACHINERY IN U.S.S.R.

According to a recent issue of the Monthly Review of the U.S.S.R. Trade Delegation in the United Kingdom giving a review of Soviet industry during the first half of 1938, the textile machinery construction industry is not working satisfactorily, and although during the first six months of 1938 the output of combing machinery was $1\frac{1}{2}$ times greater than for the corresponding period of 1937, the output was below plan in the first quarter by 31.2 per cent., and in the second quarter by 7.7 per cent. The Soviet and collective farms are supplying the textile mills with more and more agricultural raw material every year, and the mills require additional machinery in order to deal with the constantly increasing mass of raw material, and to ensure that the growing demands of the population shall be satisfied.

Although during the period under review light industry has increased production by 7.5 per cent. over the corresponding six months of 1937, this is quite inadequate. The plan for the second quarter was surpassed only slightly in regard to woollen and silk piecegoods. The increase in textile production by comparison with the corresponding six months of 1937 was only 2.6 per cent.; the plan for the first quarter was unfulfilled by 11.8 per cent., and for the second quarter was unfulfilled by 10.3 per cent. This was due to a large extent to failure to carry out the task of increasing the productivity of spindles.

POLISH TIMBER FOR EGYPTIAN COTTON

According to a recent statement in the *Danziger Neueste Nachrichten*, the first reciprocal trade barter transaction, namely, Egyptian cotton against Polish timber, has recently been concluded. By reason of this agreement the Polish timber firms are now able to consign to Egypt fixed quantities of sawn and planed timber, in return for Egyptian raw cotton.

THE ARTIFICIAL SILK INDUSTRY IN U.S.S.R.

The year 1938 has been one of great changes in the work of the artificial silk industry. Until this year the industry never succeeded in fulfilling the Government Plan, the qualitative indicators being particularly unsatisfactory. But during the first half of 1938 the artificial silk industry fulfilled the production plan by 102.5 per cent. In July there was a set-back, for although the tonnage plan was fulfilled 100 per cent., the gross output constituted 99.9 per cent. of the Plan. For this the Leningrad and Mogiliev mills (achieving only 90 per cent. and 99.2 per cent. respectively) were responsible.

During the first six months of 1938 the plan for assortments of thread was fulfilled by 100·2 per cent. for the industry generally. The Mitishchinsk mill fulfilled its task in regard to assortments by 112·2 per cent. by providing 80·6 per cent. of first quality filaments instead of the 58·7 per cent. fixed by the Plan. The Klinsk mill also worked well, but the Leningrad and Mogiliev mills again failed to fulfil their Plan.

In previous years dulled silk was produced in very small quantities, but now its production has been mastered and it constitutes some 40 per cent. of the total production. Weaves from this lustreless silk have a much better appearance than the lustre-weaves and are hardly distinguishable from natural silk. The improvement in output of thread has also had a favourable effect on the quality of the weaves.

Soviet mills are now turning out thread consisting of a large number of elementary filaments, which produce a stronger and more elastic thread.

(The Monthly Review of the U.S.S.R. Trade Delegation in the U.K.)

PRESIDENCY OF THE LIVERPOOL COTTON ASSOCIATION

Mr. James B. Gartside, a principal of the firm of Melladew & Clarke, cotton brokers, was recently elected President of the Liverpool Cotton Association. He is the younger son of Mr. T. E. Gartside, Chairman and Managing Director of the Shiloh Mills Ltd.

The new Vice-President of the Association is Mr. John Glynn Williams, a partner in the firm of Williams, Wilson & Co., cotton merchants.

OPENING OF GDYNIA COTTON EXCHANGE

The new buildings of the Gdynia Cotton Association comprising a cotton exchange and additional accommodation for arbitrage, were formally opened on September 26 and 27 last. Representatives of many countries attended the opening ceremony.

COTTON FOR SILVER

It is reported from Washington, U.S.A., that Senator Pittman, chairman of the Senate Foreign Relations Committee, has proposed the exchange of the carry-over of the American cotton crop for shipments of silver from China and India.

Under the proposal about 13,400,000 bales of cotton would be exported to the two countries in return for 670,000,000 ozs. of silver. The Government would issue currency against the silver to pay the owners of the cotton at the rate of 12·9 cents a lb. (against the present market price of around eight cents).

(Textile Weekly, Manchester)

Reviews on Current Cotton Literature

"THE JOURNAL OF THE TEXTILE INSTITUTE," JULY, 1938. Published by the Textile Institute, St. Mary's Parsonage, Manchester.

The Textile Institute is to be congratulated upon the production of this special issue of the Journal, containing a full report of proceedings of the Annual Conference held at Peebles in June last.

"THE CLASSIFICATION OF COTTON."

The Bureau of Agricultural Economics of the United States Department of Agriculture is to be congratulated upon its recent publication bearing the above title. The subject is amply and clearly treated and the many illustrations form a prominent feature of the book. The subject matter is dealt with under such headings amongst others, as "The Nature of Cotton and the Basis of its Classification," "Sampling," "Factors of and Standards for Grade," "The Determination of Grade and Staple," "Inaccuracies in Grading and Stapling," "Factors of Character," "The Effect of Moisture on Staple and Character," "The Relation of Classification to Prices," etc., etc.

"THE EMPIRE COTTON GROWING REVIEW" (October, 1938). Published by P. S. King & Son Ltd., 14 Great Smith Street, London, S.W.1., for the Empire Cotton Growing Corporation. Quarterly, 1s.; Post Free, 1s. 3d.; Annual Subscription, 5s.; Post Free.

The present issue contains a very interesting and instructive article by Mr. John A. Todd, M.A., B.L., on "Twenty-five Years of Cotton Prices." Other prominent features are a "Note on a Policy of Introduction of New Varieties of Cotton in Africa," by J. B. Hutchinson, and "Plant Selection in Native Cotton Plots," by J. D. Jameson.

"SKINNER'S COTTON TRADE DIRECTORY OF THE WORLD" (1938-39). Published by Thomas Skinner & Co. Ltd. Price 20s., post free.

The current issue, the sixteenth, of this well-known cotton trade reference book contains all the essential characteristics which go to make this book the authority which it undoubtedly is.

The customary revision of details, in collaboration with the leading Textile Associations throughout the world, has been carried through and valuable additions have been made to the information previously published. Owing to the unsettled conditions, due to hostilities, at present prevailing in China and Spain, it has been impossible to complete the necessary revision of information relating to these countries, a condition which has also been reflected in the returns received from Japan. It is hoped that in future editions this difficulty will have been overcome.

The Hosiery and Knit Goods Manufacturers' Section has been completely revised and materially extended in this issue. This Section

contains a Geographical Index of Hosiery and Knit Goods Manufacturers ; lists of Cotton, Silk, Rayon, Woollen and Worsted Hosiery Yarn Spinners and Doublers ; Hosiery Yarn and Fabrics Dyers and Finishers ; goods manufactured and also information concerning Hosiery Machine and Accessory Manufacturers. This section is also published at a nominal price as a separate volume in an endeavour to meet the requirements of this specialised branch of industry.

"ANNUAL COTTON HANDBOOK," 1938 (68th year of publication). Published by Comtelburo Ltd. Price 5s. 2d. post free.

The current issue of this extremely useful handbook, like its predecessors, contains particulars of all growths of cotton for which figures are obtainable, as well as all statistical information obtainable about the movement, consumption, and prices of cotton in all countries of the world which are interested in cotton in any stage from the agricultural commodity to the finished fabric. In this edition the weekly receipts of cotton in the ports of Genoa and Venice are included, thus restoring statistics omitted in the previous two issues. A new feature is the provision of spot quotations for the various grades of cotton quoted on the Alexandria market, but the trouble in the Far East compels the omission of the monthly Shanghai movement. The tables of receipts and stocks of cotton in the Japanese ports, however, are maintained.

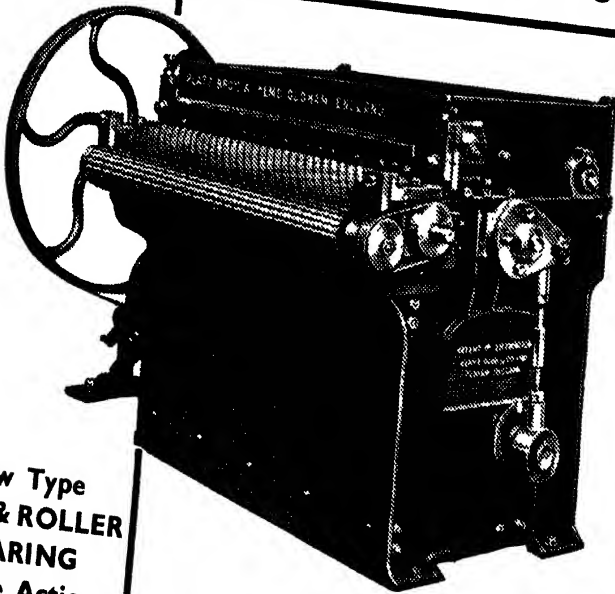
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The following reports on Economic and Commercial Conditions in the countries specified have been received. They have been printed and published for the Department of Overseas Trade, by H.M. Stationery Office :—

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ANNUAL REPORT OF THE INDIAN MERCHANTS' CHAMBER FOR 1937.

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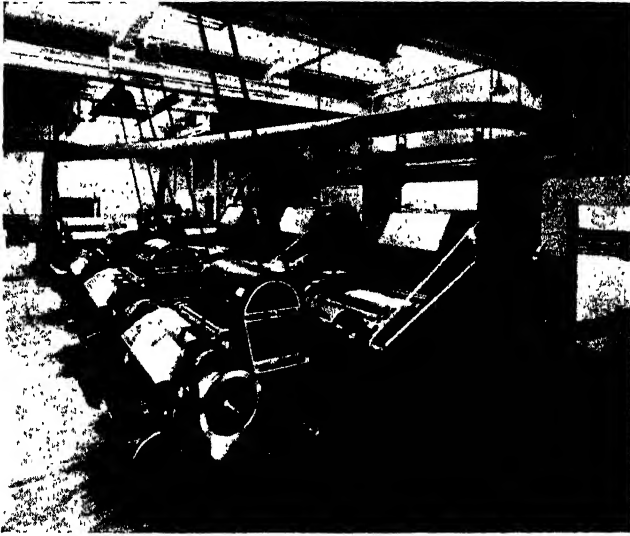
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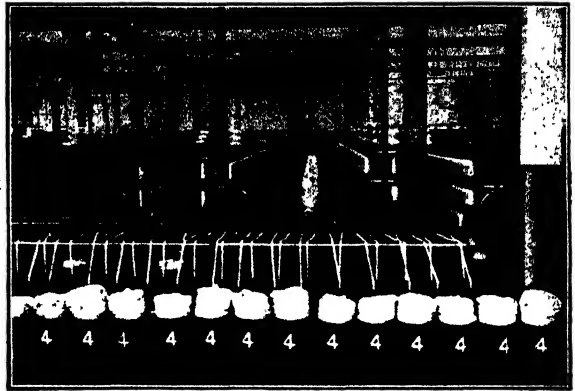
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Hungary.	Magyar Textilgyarosok Orszagos Egyesuletc, Budapest.
India.	Upper India Chamber of Commerce, Cawnpore. Bengal Chamber of Commerce, Calcutta.
Italy.	Federazione Nazionale Fascista degli Industriali Cotonieri, Milan.
Japan.	Japan Cotton Spinners' Association, Osaka.
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COMMITTEE'S COMMUNICATIONS

MILAN HUMIDITY AGREEMENT FOR EGYPTIAN COTTON

We desire to draw the attention of those of our members concerned with the spinning of Egyptian cotton to the new Humidity Agreement arrived at in Milan on November 7, 1938. The full terms, together with an explanation of the Agreement will be found on pages 190 to 194 of this issue.

The Milan Agreement, which came into force on November 21, 1938, replaces the former Agreement made in 1931 and renewed at various International Cotton Congresses held since that date. The terms of the new Agreement were communicated to our affiliated Associations on November 11 last, and the International Cotton Committee expresses the hope that members will do their utmost to ensure that the new Agreement functions satisfactorily, by adhering solidly to their part of the Agreement.

XIX INTERNATIONAL COTTON CONGRESS

The Nineteenth International Cotton Congress will be held in England during the summer of next year. The date and place will be decided later.

MEETINGS OF THE INTERNATIONAL COTTON COMMITTEE AND THE JOINT EGYPTIAN COTTON COMMITTEE

Meetings of the International Cotton Committee and the Joint Egyptian Cotton Committee will be held in Zurich during June of this year. Further particulars will be contained in the next issue of the *International Cotton Bulletin*.

MR. H. WINDFELD-HANSEN

All members of the International Cotton Federation, particularly his colleagues on the International Cotton Committee, will be delighted to hear that H.M. the King of Denmark has conferred upon Mr. Windfeld-Hansen, member for Denmark on the International Cotton Committee, the Order of "Ridder af Dannebrog," the Danish knighthood, in acknowledgment of the great ability of Mr. Windfeld-Hansen and his splendid work both at home and abroad.

On behalf of the International Federation, we extend to Mr. Windfeld-Hansen hearty congratulations upon this richly merited honour.

EGYPTIAN COTTON FILM

The delegates to the International Cotton Congress held in Egypt early this year, during the course of the Congress were entertained to the showing of a cinema film depicting the production of cotton in Egypt, from the seed to the mill.

The Congress delegates considered this film of great interest to the industry and passed a Resolution asking the Egyptian Government to forward copies of this film to the various affiliated countries in order that the cotton spinners' and manufacturers' associations interested could obtain a copy of this film on loan to show to their members.

We have now been informed that copies of this film, which is in three parts and 1,400 metres in length, have been forwarded to the following Egyptian Legations—London, Paris, Berlin, Rome, Prague, The Hague, Brussels and Berne. The film has a width of 35 m.m.

For those desiring to purchase a copy of the film, the cost will be £E30, which includes forwarding expenses. Any organisation connected with the cotton industry desiring to show this film to their members should apply to any one of the above Legations.



BELGIUM

At the close of the year 1938, the state of trade in the spinning section of the Belgian cotton industry could be summarised as follows :—

For twelve months past, stocks of yarn in spinners' hands have fluctuated around a level about twice as great as the one normally existing, in spite of a severe curtailment in production, which, at its lowest extremity, fell to 73 per cent. of normal production.

. During the last quarter, however, the volume of production and of deliveries has shown a tendency to rise. On the other hand, yarn prices have undergone further serious reductions.

The weaving section is complaining of the persistent sluggish tone of business.

On the basis of statistics prepared by the Belgian Ministry of Finance relating to the first ten months of 1938, the exports of cotton piecegoods can be estimated at about 25,450 tons for the year which has just closed. In 1937 the corresponding figures showed exports at 31,800 tons, which shows that they have decreased by 20 per cent. on the year.

An increase in wages will become operative throughout the textile industry as from the beginning of January 1939. This increase is justified on the grounds of the rise in the retail price index.

Taking the standard of wages paid in July 1936 as 100, those paid in 1938 can be fixed at 108.25 and those in January 1939 at 111.

The original report in French runs as follows :—

A la fin de l'année 1938, la situation de la filature belge de coton se caractérise comme suit :—

Depuis un an, les stocks de filés en filature oscillent faiblement autour d'un niveau environ deux fois plus élevé que le niveau normal et cela, malgré une réduction sévère de la production, qui, au plus bas, est tombée à 73% de la production normale.

Dans le cours du dernier trimestre, la production et les livraisons ont marqué une tendance à augmenter.

Par contre, les prix des fils ont subi une nouvelle et sérieuse dépréciation.

Les tisseurs se plaignent du ralentissement persistant des affaires.

En se basant sur les statistiques dressées par le Ministère Belge des Finances et relatives aux dix premiers mois de l'année 1938 ; on peut évaluer à 25.450 tonnes environ, les exportations de tissus de coton pour l'année qui vient de s'écouler.

En 1937 les exportations ont été de 31·800 tonnes. Il y a donc un recul de 20%.

Une hausse des salaires sera appliquée dans l'industrie textile dès le début de janvier 1939. Cette hausse est justifiée par l'augmentation, de l'indice des prix de détail.

Les salaires payés en juillet 1936 étant représentés par 100, ceux de 1938 étaient représentés par 108·25 et les salaires de janvier 1939 seront représentés par 111.

CHINA

Mill consumption in China during 1938-39 is forecast at about 1,780,000 bales compared with approximately 1,300,000 bales for the preceding crop year. Mill consumption during 1937-38 was fully 50 per cent. below that of the previous season because a large number of cotton mills were destroyed or damaged in the Sino-Japanese hostilities. It was reported that less than 10 per cent. of the cotton mills in China were able to operate without interruption during the 1937-38 season. At the present time, the operation of many of the Chinese mills in various parts of the country has been taken over by Japanese companies. The rebuilt mills at Tsingtao are expected to begin operations in the near future.

Home consumption of raw cotton in China during 1938-39 is expected to continue at a high level, being forecast at 1,255,000 bales, or approximately the same as last year.

(U.S. Department of Agriculture)

DENMARK

By an Act of Parliament, which came into force on July 1, this year, employers of labour in Denmark have been called upon to grant two weeks' holidays with full pay to all their workers.

By a voluntary agreement with the textile trade unions, we granted a week's holiday with full pay to our workers as long ago as January 1, 1932. Corresponding to the wish of the trade union the allowance of the holidays were shared between the workers in such a way that, irrespective of their ordinary pay, they had the same sum of money paid out in their holidays, a sum which is calculated on the basis of an average quotient per working hour in the preceding year. The result of this has been, that, *e.g.*, a loom-overlooker, who obtains a weekly rate of 80-100 Kroner, only is paid 55-62 Kroner during his holidays, while on the other hand a male time-worker, who only earns 45-48 Kroner a week, also receives 55-62 Kroner in holiday pay. Of course, this must be considered as a fair and friendly principle on the workers' side, but, as you will understand, it involves very comprehensive calculations as to our office, as we take care of the administration and the distribution of the holiday pay.

Further, the Danish textile industry, by negotiations with the trade union in January last year, in renewing their agreements with the workers, granted an increase in wages of 7 per cent., an increase which is nearly

compensated by the fact that the retail price index has risen proportionately.

The Danish textile industry is now, after a rather bad period in the first months of last year on account of the lack of the buying power and an increased competition from Germany, again well employed, and work is now proceeding at full time.

(The Danish Master Cotton Spinners' and Manufacturers' Association)

ENGLAND

SPINNING SECTION

The position of trade during the last quarter indicates little improvement over the previous quarter, and information to hand shows that the degree of activity in both the American and Egyptian sections has been approximately 65 per cent.

Proposals for a Cotton Industry Enabling Bill have been submitted to the President of the Board of Trade, and it is expected that at an early date a Bill will be introduced in Parliament to give effect to such proposals

MANUFACTURING SECTION

Although there was some slight temporary improvement in the early part of the quarter, conditions in the manufacturing section have not generally improved over the full period. The falling-off is serious, and as a consequence of the lack of demand, prices are most unsatisfactory. The export figures for 1938 will probably be the worst for many years, and unfortunately the future prospects do not give much ground for optimism. The disturbed political situation is and has been a basic cause of the decline, and until there is some definite improvement, there cannot be any restoration of the confidence which is essential to encourage buyers to place orders.

FRANCE

The unfavourable situation described in the last issue of the "International Cotton Bulletin" continued during the first part of the fourth quarter of 1938. Then, from the middle of November onwards, an improvement in demand was noticeable in connection with which, unfortunately, no corresponding improvement in prices occurred. The latter still show but little remuneration.

No organised short time working is in operation. A certain number of firms, however, continue to work at less than 40 hours per week. Having regard to this individual short time working, and to the stoppage represented by machinery entirely stopped, the degree of activity in the industry at the end of November was 75.5 per cent in the case of the spinning section, and 80.6 per cent. in the weaving section.

With regard to wages, an increase of about 3 to 5 per cent., according to workers' categories, has become operative in the Normandy district.

The original text in French is appended herewith :—

La situation peu favorable décrite dans le précédent No. du Bulletin s'est continuée pendant la première partie du 4^{ème} trimestre 1938. Puis à partir du milieu de novembre on a constaté une certaine amélioration de la demande, à laquelle ne correspond malheureusement pas une amélioration équivalente des prix demeurés encore peu rémunérateurs.

Il n'est plus pratiqué de chômage concerté. Toutefois un certain nombre de firmes continuent à travailler moins de 40 heures par semaine. Compte-tenu de ce short time individuel et du chômage représenté par l'outillage complètement arrêté, l'indice d'activité des manufactures était fin novembre de 75,5% pour la filature et 80,6% pour le tissage.

En ce qui concerne les salaires, une augmentation de l'ordre de grandeur de 3 à 5% environ suivant les catégories d'ouvriers est intervenue dans l'industrie cotonnière normande.

IMPORTATIONS ET EXPORTATIONS

IMPORTS AND EXPORTS

					1938	
					2ème trimestre Second Quarter	3ème trimestre Third Quarter
					Quintaux Métriques (In metric quintals)	
A—Importations : (Imports)						
1.	Fils de coton (Cotton Yarn)	..	..	..	1,444	940
2.	Tissus de coton (Cotton Piecegoods)	..	..	..	2,237	1,418
B—Exportations : (Exports)						
1.	Fils de coton : Exportations totales (Cotton Yarn—Total Exports)				20,405	21,457
	A destination de l'Algérie, Colonies et Pays de Protectorat .. (Algeria, Colonies and Protectorates)			..	6,665	8,438
	Marchés étrangers (Foreign Markets)			..	13,740	13,019
2.	Tissus de coton : Exportations totales (Cotton Piecegoods—Total Exports)				104,895	119,803
	A destination de l'Algérie, Colonies et Pays de Protectorat .. (Algeria, Colonies and Protectorates)			..	95,550	109,936
	Marchés étrangers (Foreign Markets)			..	9,345	9,867

(*Syndicat Général de l'Industrie Cotonnière Française*)

GERMANY

SPINNING SECTION

No important alteration in the state of trade in the German cotton spinning section has taken place during the last quarter of 1938, as compared

with the previous months. Production and sales of yarns, and at the same time the degree of occupation of the mills, have remained the same.

The original report follows in German :—

Auch im letzten Quartal des Jahres 1938 ist gegenüber den vorausgegangenen Monaten eine nennenswerte Änderung in der allgemeinen Geschäftslage der deutschen Baumwollspinnereien nicht eingetreten; Erzeugung und Absatz der Gespinste, und damit der Beschäftigungsgrad der Betriebe hielten sich durchweg auf den bisherigen Stand.

(Fachgruppe Baumwollspinnerei der Wirtschaftsgruppe Textilindustrie)

MANUFACTURING SECTION

The demand on current cloth contracts during the 4th quarter of 1938 was more active as compared with the 3rd quarter. The degree of occupation of the looms during the last quarter has shown a still further increase in percentage of production.

The receipt of new orders during the 4th quarter has been slightly reduced. The order books at the end of the 4th quarter, however, were fully made up for looms for two or three months ahead.

The following is the original report in German :—

Der Abruf auf laufende Gewebe-Kontrakte war im 4. Quartal noch reger als im 3. Quartal. Auch der Beschäftigungsgrad unserer Webstühle hat im 4. Quartal eine weitere Steigerung um einige Prozente erfahren.

Der Eingang an neuen Aufträgen hat im 4. Quartal etwas abgenommen. Der Auftragsbestand Ende des 4. Quartals reicht aber für eine Beschäftigung unserer Webstühle im bisherigen Umfang auf 2-3 Monate aus.

(Süddeutsche Bezirksgruppe der Fachuntergruppe Rohweberei der Fachgruppe Baumwollweberei)

HOLLAND

COTTON SPINNING

Conditions in the spinning section have slightly improved during the last few months. Most mills are fairly well employed and although margins are not always remunerative, conditions on the whole are a little better than last summer.

COTTON MANUFACTURING

The home trade demand for the autumn season has somewhat improved and sales have not been unsatisfactory. Export business has been rather stationary for those markets where quotas exist. For the other markets competition with other countries is very severe and it has been difficult to obtain orders. Most mills are rather better employed than three months ago, but prospects are very uncertain, also on account of the political unrest.

ITALY

During the fourth quarter of 1938 the Italian Cotton Industry has shown a marked improvement in activity brought about by an improvement of sales in the home market and in some foreign markets.

The degree of occupation of the mills has increased slightly.

The original report in Italian is as follows :—

Durante il 4° trimestre 1938 l'industria cotoniera italiana ha segnato una ripresa di attività dovuta al miglioramento delle vendite sul mercato interno e anche su taluni mercati esteri.

L'occupazione operaia è leggermente aumentata.

(Federazione Nazionale Fascista degli Industriali Cotenieri, Milan)

The following figures represent the indices of production in the cotton spinning and manufacturing industries in Italy. The year 1928 is taken as the basic year (*i.e.*, 100).

(1) COTTON SPINNING .

	Jan.	Feb.	Mar.	Apl.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Mtly. Aver.
1936	77.5	79.6	78.2	72.4	75.0	67.9	58.9	43.7	63.0	66.5	71.5	80.2	69.5
1937	81.9	88.8	92.0	95.1	98.6	98.7	95.3	76.5	95.6	96.4	96.4	99.5	92.9
1938	95.6	97.4	97.2	88.1	88.8	86.8	81.9	68.8	87.0	92.0	—	—	—

(2) COTTON MANUFACTURING

	Jan.	Feb.	Mar.	Apl.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Mtly. Aver.
1936	79.1	80.1	82.0	77.7	80.2	77.3	73.5	58.5	70.4	75.6	77.3	76.8	75.7
1937	79.4	87.8	93.9	94.1	70.6	97.8	96.0	78.9	95.3	98.7	94.0	98.0	90.4
1938	97.4	101.5	104.9	98.1	100.7	96.8	93.8	78.5	94.3	99.9	—	—	—

JAPAN

Yarn production in Japan during September and October in 1938 was about 40 per cent. below that of the same months in 1937. It is reported that production may be further curtailed unless cloth exports can be increased. Cloth exports during September and October of this season were approximately 25 per cent. below those of a year ago. A relaxation in the prohibition of cloth exports to China has been announced as a shipment of 25 million yards of cloth not saleable in foreign countries has been authorised. Domestic sales of pure cotton goods are not permitted at the present time, except special items and for military use.

(Foreign Crops and Markets)

SWEDEN

The degree of occupation of the industry remains at about the same level as before. Slightly better conditions are, however, indicated.

Valid from January 1, all hourly rates have been raised by four Swedish öre pro hour. This is one of the points in the new agreement between the employers' and the workers' associations.

(Svenska Bomullsfabrikantföreningen)

SWITZERLAND

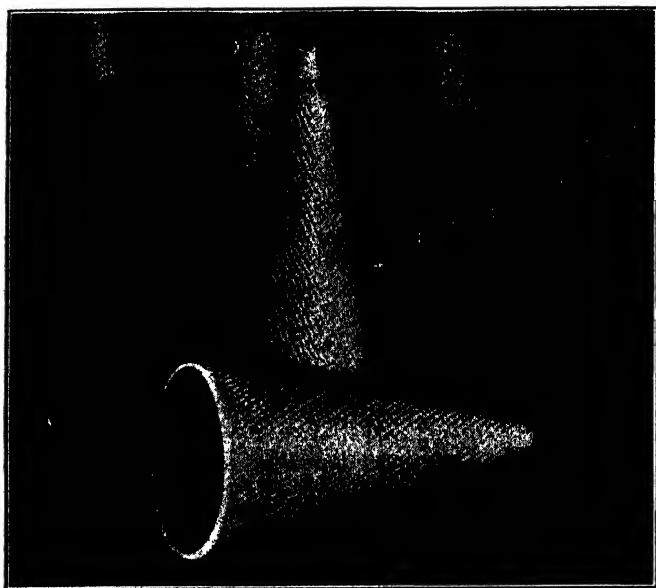
After the European political situation showed an improvement the demand which had been artificially held up showed a general improvement. This, together with the usual seasonal improvement, caused a general increased activity. Most of this improvement was felt by those firms catering for export in the fine spinning and weaving sections, whereas the coarse spinning and weaving sections producing for the home market, with the exception of the coloured goods section, were not able to take advantage of the improvement. On the whole, the demand did not exceed the maximum of production as set out by the collective agreements of the Swiss Spinners', Doublers' and Weavers' Associations.

The following is the original report in German :—

Nachdem die europäische politische Lage seit Oktober eine gewisse Beruhigung erfahren hat, verlangte der künstlich zurückgehaltene Bedarf wenigstens teilweise Befriedigung. Zusammen mit internen Saisonbewegungen stellte sich auf der ganzen Linie etwas bessere Beschäftigung ein. Am meisten fiel davon für die stärker am Export beteiligte Feinspinnerei und -Weberei ab, während die vorwiegend inlanderorientierte Grobspinnerei und -Weberei, mit Ausnahme bunter Artikel, nur spärlich profitierten. Die Nachfrage überstieg im grossen Ganzen den Rahmen nicht, welcher der Produktion durch die kollektiven Restriktionen des schweizerischen Spinner-, Zwirner- und Weber-Vereins vorbestimmt war.
(*Schweizerischer Spinner-, Zwirner- und Weber-Verein*)

U.S.A.

The latest monthly report of the Census Bureau, Washington, shows that the consumption of lint cotton by U.S. mills in December amounted to 565,000 bales, against 596,000 bales in November and 433,000 bales in December 1937. This brings the total so far this season to 2,799,000 bales, against 2,651,000 bales a year ago. Exports for the month are returned at 361,000 bales, excluding linters, against 481,000 bales in November and 751,000 bales in December 1937, making 1,897,000 bales so far this season, against 3,185,000 bales in the same period last season. Stocks in the hands of manufacturers amount to 1,697,000 bales, against 1,714,000 bales last month and 1,718,000 bales in the corresponding month of 1937, and in outside warehouses to 15,331,000 bales, against 15,578,000 bales and 11,867,000 bales. Spindles active during the month of December totalled 22,445,000, against 22,449,000 in November, and 22,328,000 in December 1937.



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ARGENTINA

The National Cotton Board has issued a statement indicating that, in the 1937-38 season, the total area sown to cotton was 424,030 hectares (410,900 in 1936-37), and the area harvested 329,693 hectares (against 288,730). The actual production of cotton fibre was 51,445 metric tons in comparison with 31,170 tons in 1936-37, and in both seasons fibre production represented 27.5 per cent. of the raw cotton harvested. Of the 123 ginning establishments in the country, 87 were situated in the Chaco, and that Territory was responsible for approximately 80 per cent. of the production of cotton fibre in Argentina in 1937-38.

With regard to the 1938-39 season, the National Cotton Board stated that, according to present indications, the area sown will amount to 412,000 hectares, and, while this does not reach the area sown in 1937-38, it does, nevertheless, show the confidence of growers in the future of cotton cultivation in the Republic, in spite of the poor results obtained in the last two seasons.

(Bank of London and South America Ltd.)

The National Cotton Board of the Argentine Ministry of Agriculture issues on January 10 its final estimate of the area under cotton this season. This puts the acreage at 1,004,992, as compared with the previous estimate of 1,018,088 and with the final estimates of 1,047,600 for 1937-38 and 1,030,000 for 1936-37. The final estimate of the yield in 1937-38 was issued last month and gave the production as 237,274 bales (of 478 lb.), showing a yield of 198.8 lb. per acre of the total area planted. As only 814,700 acres was harvested, however, the actual yield was 255.7 lb. per acre.

AUSTRALIA

The 1938 cotton crop, the picking of which began in March, is expected according to official estimates, to reach about 18,000 bales, compared with 8,519 for the 1936-37 crop and 13,504 for 1935-36.

Cotton consumption for the calendar year 1937 is estimated at about 25,000 bales. The importation of considerable quantities of cotton was necessary. Deliveries of Australian cotton by the Queensland Cotton Board to the Australian mills in 1937 totalled 11,321 bales, compared

with 13,533 in 1936. During 1937 spinning mills are reported to have increased their activity to a considerable extent. According to the Queensland Cotton Board, cotton spinners in Australia have overcome their initial difficulties and are now operating on a relatively efficient basis. The Government is said to be considering a scheme whereby the spinners would be allowed to establish a reserve stock of imported cotton under customs control, which would be released duty-free as needed after the Australian crop had been consumed, thus reducing the risk of running short of supplies which exists under the present arrangements, whereby permits to import cotton duty free are granted only after the size of the Australian crop becomes known, the permits covering only such quantity of cotton as is required to bridge the gap between Australian production and total requirements.

The seed cotton received at the ginneries is classed as to grade and staple by the classifiers of the Department of Agriculture, and a tag bearing the grade and staple is attached to the bale. If the seed contains excessive moisture it is passed through the drying machine in order to obtain a better quality ginning. It is then baled, classed and weighed, and a record is made of all details with respect to the name of the grower, railway station from which consigned, grade and staple variety, tare and special lot number. The bales of seed cotton of one variety are always ginned together according to classification, and cotton of different varieties is never mixed at the ginneries.

The marketing of the Queensland cotton crop is carried out entirely by the Queensland Cotton Board, which handles, processes and markets the entire cotton crop, taking it from the actual grower and landing it at the spinning mill.

The Commonwealth bounty payments made to growers for cotton production operates on a sliding scale. It is fixed at a certain figure when the spot price of American Middling at Liverpool is 6d. a lb. If the price of American in Liverpool rises to 7d. the bounty payment is reduced by 1d. If the price of American falls below 6d., the bounty is increased. For the 1937 season and for the 1938 and 1939 seasons, the amount of bounty payable to growers in Australian currency when the spot price of American at Liverpool is 5d. is 5.25d. per lb., when the price of American at Liverpool is 6d. the bounty is 4.25d., and when the price of American at Liverpool is 7d., the bounty is 3.25d.

The local production of cotton linters was not sufficient to meet the requirements of the Australian market owing to the smaller production of cotton. During the past two years there has been a large increase in the consumption of cotton linters, used extensively in the upholstering of automobile bodies.

(Textile Journal of Australia)

BRAZIL (NORTH)

The second official estimate of cotton production for the 1938-39 season in the North and North-Eastern States of Brazil, furnished by the *Servico de Plantas Texteis*, is 137,300 metric tons compared with the

first estimate—issued in July—of 145,000 tons, and an actual output of 217,800 tons in the 1937–38 season. The latest estimates for each State in the Northern zone are as follows, the production in 1937–38 being added in parentheses :—Parahyba, 30,000 tons (60,000); Ceará, 28,000 tons (35,000); Pernambuco, 25,000 tons (40,000); Rio Grande do Norte, 20,000 tons (40,000); Maranhao, 12,000 tons (10,800); Alagôas, 10,000 tons (16,000); Sergipe, 5,000 tons (6,000); Piahy, 3,000 tons (6,000); Pará, 3,000 tons (3,000); North Bahia, 1,300 tons (1,000). The total crop will amount to approximately 633,000 bales of 478 lbs. each.

(Bank of London and South America Ltd.)

BRAZIL (SAO PAULO)

Up to the end of November, the distribution of seed for planting the 1939 *Paulista* cotton crop showed a decrease of over 9 per cent. compared with that distributed last season, but owing to the better quality of this year's seed and the favourable weather, the experts of the Cotton Service estimate that the out-turn of the coming crop in this State should be approximately the same as in 1938, namely, 250,000 metric tons. Pests have appeared in some districts, and it seems to have been established that it is inadvisable to sow seed in the State of Sao Paulo in September, for it is the early planted cotton which suffers most damage.

(Bank of London and South America)

EXPORTS OF RAW COTTON FROM THE PORT OF SANTOS

JANUARY 1ST TO OCTOBER 31ST, 1938

Destination	Bales
Bremen	176,544
Kobe	175,116
Liverpool	151,374
Hamburg	104,999
Havre	97,712
Osaka	92,722
Rotterdam	29,233
Gdynia	27,189
Shanghai	21,377
Yokohama	15,440
Dunkirk	15,092
Genoa	17,400
Venice	13,102
Antwerp	11,873
Ghent	9,409
Trieste	7,683
Leixoes	6,628
Abo	3,518
Gothemburg	2,920
Enschede	2,746
Czechoslovakia	2,490
Nykoping	2,200
Manchester	2,323
Riga	2,048
Oporto	2,097
Stockholm	1,400
Varberg	1,077
Amsterdam	677
Lisbon	663
Buenos Aires	406

(Continued on page 144)

EXPORTS OF RAW COTTON FROM THE PORT OF SANTOS
—Continued

Description	Bales
Wasa	325
Boston	249
Bergen	242
Burgos	109
New York	2
Total	998,385

PRODUCTION OF COTTON IN SAO PAULO
in Types, March 1–October 31, 1938

Types	Bales 1937	Bales 1938	Kilos 1937	Kilos 1938	% 1937	% 1938
1	—	—	—	—	—	—
2	928	2,638	165,987	461,706	0.08	0.18
3	30,159	97,977	5,306,856	17,363,481	2.66	7.01
4	159,998	346,507	28,352,755	61,741,337	14.20	24.91
5	342,731	492,121	60,795,352	88,053,403	30.46	35.54
6	324,757	295,019	57,440,742	52,663,737	28.78	21.25
7	192,836	128,858	33,826,433	22,979,372	16.95	9.27
8	62,019	20,190	10,774,282	3,601,854	5.40	1.46
9	12,774	3,025	2,201,746	532,792	1.10	0.21
Inf. to 9	4,179	2,367	726,068	402,413	0.37	0.17
Total	1,130,381	1,388,702	199,590,221	247,800,095	100.00	100.00

The length of staple during the month of October was 28 mm. average.

BULGARIA

The Bulgarian Minister for Agriculture is making arrangements for the area to be cultivated with cotton in 1939 to be raised to 71,500 hectares, which compares with only 8,000 hectares in 1932 when the Government took steps to assist cotton cultivation by the supply of better quality seed. Given an average crop the yield next year will suffice to meet about 70 per cent. of the requirements in cotton of Bulgaria.

(Textile Weekly, Manchester)

CHINA

The 1938 Chinese cotton crop, including that of Manchuria, is estimated at 2,300,000 bales of 478 lbs., according to the U.S. Department of Agriculture. This compares with the estimated 3,560,000 bales produced in 1937 and the record crop of 3,870,000 bales harvested in 1936. The 35 per cent. reduction in the crop this year as compared with that of last season is primarily the result of a smaller 1938 acreage. The acreage this season was curtailed because of the unfavourable prices received for the 1937 cotton in some sections, the inability even to sell last year's crop in other areas, and desire to increase food crops in many districts. The Manchurian production in 1938 is forecast at only 73,000 bales compared with 90,600 bales harvested last year.

Cotton exports from China for the 1937–38 crop year ended September 30 were the largest on record, amounting to 522,000 bales of 478 lbs. each. This compares with 251,000 bales exported in 1936–37

and 157,000 for the five-year average during 1931-32 to 1935-36. China in the past has exported principally a coarse or rough type of cotton, largely to Japan, the United States, and Europe. During the 1937-38 season, however, over 85 per cent. of Chinese exports went to Japan, where most of the season only imports of raw cotton suitable for spinning were permitted. It is reported that the Japanese plan to export as much as 550,000 bales of Chinese cotton to Japan and 170,000 bales to Manchuria during the 1938-39 marketing season from this year's short crop. Observers in the Orient, however, do not believe such large amounts can be obtained in China.

ECUADOR

The cotton crop of 1937-38 is estimated at about 6,900,000 lbs., equivalent to about 14,000 bales of 478 lbs. each. Definite information concerning the 1938-39 crop is not yet available, but it is generally believed by local authorities that it will be substantially below that of the preceding year.

Exports of cotton from Ecuador in 1937-38 amounted only to about 15,000 lbs., whereas in 1936-37 about 2,368,000 lbs. were exported.

(Textile Raw Materials)

EL SALVADOR

Cotton production in 1937-38 is estimated at about 4,600 equivalent bales of 478 lbs. Cotton consumption for the season is placed at about 4,800 bales. Production and consumption were higher in 1937-38 than in the previous season owing to increased mill activity. One of the two existing mills added 1,000 spindles during the year and a third mill was opened with 3,000 spindles, making a total of 10,000 spindles for the country.

Under a ruling of the Ministry of the Treasury of El Salvador, foreign cotton may not be imported until local cotton has been exhausted. It is said that local mills would like to obtain permission for the importation of approximately 400 bales of cotton, owing to the fact that the current supply may not be sufficient for domestic requirements.

(Textile Raw Materials)

GREECE

The Commercial Secretary to His Majesty's Legation at Athens reports that the latest returns give the Greek cotton crop for 1938 as about 48 million kilograms, against 63 million kilograms in 1937. The area under cotton was reduced from 820,156 stremmes in 1937 to 747,267 stremmes in 1938. (*Note.*—There are about four stremmes to the acre.)

In June last a Ministerial Decree was published providing for the allocation of a premium of ten drachmae per kilogram on Greek cotton exported abroad against free exchange within a limit of one million kilograms. This decree was subsequently cancelled, presumably owing

to the fact that the crop was below expectations and that the bonus offered was insufficient to induce growers to export their cotton. It was announced in the "Messenger d'Athenes" of December 16 that the Agricultural Bank had been instructed to acquire up to two million okes of cotton in order to maintain prices and to discourage speculative price fluctuations. (*Note*.—One oke=2,832 lbs.)

(*U.K. Department of Overseas Trade*)

The area planted to the cotton crop in Greece for 1938 was placed at 185,000 acres, or 18,000 less than in 1937, and unfavourable climatic conditions have reduced the yield per acre. The latest estimate by the Greek Cotton Institute placed the 1938 crop at about 70,000 bales of 478 lbs. each, compared with 95,000 bales produced in 1937. The short local crop, in the opinion of local manufacturers, will have to be supplemented by larger imports. Although Greek manufacturers are endeavouring to convince the Government that larger quantities of American cotton are needed, thus far the Ministry of National Economy has considered the price factor and issued permits chiefly for Indian cotton.

(*U.S. Department of Commerce*)

The weather in September and the first half of October was rather favourable for the growth of cotton. Nevertheless, some damage was done to crops by worm and by the prolonged drought in many parts of Greece. The cotton crop of this year, in spite of the slight increase in the area under cultivation, is forecast as rather poor and considerably lower than last year's. Rain in October brought some improvement to crops, causing a slight increase in the estimate of production. Cotton picking on unirrigated land was finished by the middle of October in good conditions while on the irrigated land it had begun at the end of the month.

(*International Institute of Agriculture*)

MEXICO

A correspondent in Mexico City sends us the following article dated October 20 :—

Approximately 55 per cent. of Mexico's cotton production is being handled direct this season by the Federal Farm Bank system of the country.

Estimates place the 1938 yield at 236,000 bales, a drop of 46,000 bales from 1937 when production totalled 282,000 bales.

Of the current season's crop, the two Federal Agrarian Banks, the National Bank of Communal Credit and the National Bank of Agricultural Credit, financed the production and are disposing of a total of 131,000 bales. The remaining 105,000 bales were grown by independent producers.

This season's yield in addition to being shorter is of poorer grades than that of 1937. Forty per cent. of the current harvest is of middlings and better. Lack of water during the growing season contributed to the decline in yield and much rain during the picking season made for poor grades.

The following table shows estimates of this year's yield in bales as compared with the 1937 production :—

Region	1938	1937
Laguna	110,000	136,000
State of Chihuahua :		
Delicias Area	12,000	24,000
Juarez	15,000	17,000
Rest of State	3,000	5,000
Matamoros Area	35,000	42,000
Sonora and Sinaloa	6,000	8,000
Coastal—Veracruz and Guerrero	5,000	5,000
Lower California	50,000	45,000
Totals	236,000	282,000

As shown, the most pronounced declines in yield have been in the Laguna region, the Delicias area in the State of Chihuahua, and the Matamoros area. Lower California was the only section to register a gain. The Coastal region held its own. Every other area shows a reduction.

The growth of governmental control in cotton production has been hastened, as in other spheres of agricultural and industrial enterprise in the country, through the exercise of the power of expropriation.

In the vigorous prosecution of its programme of social and economic reforms, the Government, wherever it has seen fit to do so, has expropriated for the benefit of the peasants such lands as it has deemed necessary for their welfare. Great estates built up, improved and nurtured to a status of high productiveness by private capital have been turned over to labourers who formerly worked upon them for the owners. Erstwhile peons have been ushered, with a suddenness that has bewildered them, into the responsible role of land-owners and told to work and prosper in the cultivation of that which inherently belongs to them.

In carrying out such a programme of socialisation the Government has found it necessary to provide money and constant advice to the new land-owners. Financing of the agrarians has been carried on through the newly created federal farm bank system. This includes the two banks mentioned, the Communal Credit and the Agricultural Credit Bank.

The Communal Credit Bank operates chiefly for the ejidal or communal units, supplying cash and credit for operation until harvest time, then marketing the agricultural yield, liquidating the loans advanced and dividing the profit, if any, among the peasants assisted. The Agricultural Credit Bank is principally for financing major enterprises having to do with agriculture, irrigation projects and similar undertakings.

In financing the peasants in the cotton programme in 1937, according to well informed sources, the Government invested approximately 50,000,000 pesos, nearly U.S. \$14,000,000 at the rate of exchange then prevailing. The recovery was reliably reported as 18,000,000 pesos short of the amount invested.

Competent observers say this year the outlook is brighter, with indications that the recovery of the amount invested will be close to 100 per cent.

The extent by areas of the Government's control of this year's crop is shown herewith.

Of the Laguna total production of 110,000 bales, the federal farm bank system financed the production of 82,000 bales ; of the yield of 30,000 bales in the State of Chihuahua it financed the growing of 14,000 bales ; of the 35,000 bales grown in the Matamoros region, it financed 5,000 bales, and of the 50,000 bales produced in Lower California, it controlled 30,000 bales. These figures show farm bank control of 131,000 out of the season's 236,000 bales.

Before this Governmental advance, independent production is retreating rather rapidly. The question of profit and loss is not the matter of paramount importance to the Government than it is to individual enterprise, at least not for the time being. From the Government's viewpoint, generally speaking, the main idea is to create opportunity for its people. Indications are that as long as the Government coffers can stand the strain, this process will go on. In the meantime private enterprise, particularly of foreign origin—British and American—is finding conditions difficult.

One of the largest sales by the Government through the farm bank system of the current season's crop was made recently in the disposal of a lot of 45,000 bales at 51.60 centavos a lb., a little more than 10 cents U.S. currency at the prevailing rate of exchange. This cotton was taken by four firms as follows :—

Jose Figueroa, leading Mexican cotton factor, 19,000 bales ; Rosita, S.A., firm headed by Paul King, formerly with Anderson, Clayton & Co., 15,000 bales ; Anderson, Clayton & Co., Houston, 7,000 bales ; George H. McFadden & Bros., Houston, 4,000 bales.

A later sale of 800 bales brought 56.50 centavos a lb.

Cotton seed is being disposed of on pro rata basis to mills in Torreon and other places at 110 pesos (\$22) a ton.

Exports of the current season's crop total to date 67,000 bales, leaving 169,000 bales for the domestic demand which estimates place at 170,000 bales. Recent report indicates the Laguna crop may be a little ahead of the 110,000 bales mentioned, since picking was still in progress late in October. However, little if any more cotton of the current harvest is expected to be exported.

Of that already exported, 22,000 bales were from the Matamoros production and were for the accounts of Anderson, Clayton & Co., and George H. McFadden & Bro.; of Houston, and J. Kahn & Co., of Dallas. The other 45,000 bales exported were from the Lower California production.

In this connection, the Government is reported considering a subsidy for the Lower California growers in order that they may export their cotton at a lower price than that which prevails in the country so that it will not flood the market and break down the price of the other production which is sufficient for domestic consumption.

The estimate of domestic requirements from the new crop, 170,000 bales, is 72,000 bales less than the requirements from the 1937 crop. Labour trouble has interfered considerably with the operation of textile

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mills in Mexico in recent months and adding to the spinners' worries has been a marked decline in market demands due to economic conditions in the country.

It is now estimated that the cotton crop for 1937-38 will amount to approximately 225,000 bales, of which the domestic industry is expected to take 170,000 bales. The price of domestic raw cotton is stated to have advanced slightly during the third quarter of this year. According to import data, it would appear that imports of Egyptian cotton are running on normal levels. Cotton manufacturers report sufficient stocks of both domestic and imported cotton for their immediate needs. The Mexican Government is expected to assist in exporting cotton which may not be needed for the domestic mills.

(U.S. Dept. of Commerce)

NICARAGUA

Cotton exports for the 12 months ended July 31, 1938, totalled about 4,100 equivalent bales of 500 lbs. It is said, however, that not all of the cotton exported was sold, considerable portions having been shipped on consignment and that financial returns to the local producers are not promising. As a consequence, the cotton plantings for the 1938-39 season are believed to be substantially smaller and the production is expected to be considerably reduced as compared with that in 1937-38, the latter being estimated at about 5,000 bales. However, it is pointed out that the current plantings are made on better land and that the local consumption will increase owing to the fact that a mill has been constructed in Managua and the machinery, brought from Mexico, is about to be installed. It is also believed by local exporters that the remainder of the 1937-38 crop will be absorbed by Guatemala.

(Textile Raw Materials)

NETHERLANDS INDIES

Exports of unginned cotton for the 1937-38 season from Netherlands Indies totalled 2,358 metric tons against 3,972 the year before and shipments of ginned cotton 1,282 metric tons against 519 the previous year.

(U.S. Department of Commerce)

PARAGUAY

Cotton exports for the twelve months ended July 31, 1938, totalled 9,492 metric tons, equivalent to about 42,000 bales of 500 lbs., according to statistics compiled by the Banco Agricola.

The 1937-38 crop is placed by the Ministry of Economy of Paraguay at 9,100 metric tons, or about 42,000 bales of 478 lbs. each, from a planted area of about 145,000 acres, the yield per acre being estimated at about 440 lbs. of seed cotton. The ginning of same is estimated at about 31.5 per cent. No cotton is imported into Paraguay.

Cotton planting usually begins about the middle of August and continues through the first weeks of the following year. Picking begins about the middle of March and continues to the end of July. Sales and deliveries by planters begin in March and run through August and September, while the export season begins about April, the bulk of the shipments being made from May to September. Local consumption is estimated at about 1,700 or 1,800 bales.

(U.S. Department of Agriculture)

SUDAN

The following Cotton Progress Report for December, 1938, season 1938-39, has been received from the Sudan Government Department of Agriculture and Forests.

	Area Feddans	Picked to date K.315 R.	Estimated Total Yield K.315 R.	Re- marks	Last Season Area Feddans	Final Yield K.315 R.
SAKEL IRRIGATED						
1. Gezira :—						
(a) S.P.S. Ltd. .	167,066	—	800,000	—	167,982	762,288
(b) K.C.C. Ltd. .	38,255	—		—	38,671	184,688
(c) Abdel Magid .	4,515	—	20,500	—	1,720	10,418
(d) Gondal . .	390	—	1,600	—	390	1,974
2. White Nile :—						
(a) Dueim . .	500	—	2,000	—	526	2,260
(b) Private Estates	9,505	838	35,500	—	11,629	*40,739
3. Tokar . . .	40,000	—	80,000	—	20,000	28,116
4. Kassala . . .	33,282	—	63,000	—	31,850	62,534
Total . .	293,513	838	1,002,600	—	272,768	1,093,017
AMERICAN IRRIGATED						
5. Northern Province :—						
(a) Dongola Govt. Estates . .	2,160	3,018	10,470	—	2,177	8,564
(b) Berber Govt. Estates . .	2,018	9,498	9,498	Final	2,420	12,314
(c) Zeidab S.P.S.	5,554	20,867	20,867	„	5,159	20,970
(d) Other Private Estates . .	600	2,206	2,206	„	1,373	5,138
(e) Sagias . .	200	—	500	—	570	597
6. Khartoum : Private Estates . .	73	65	73	—	163	750
Total . .	10,605	35,654	43,614	—	11,862	48,333
AMERICAN RAINGROWN						
7. Kordofan . .	115,000	29,787	110,800	—	116,000	115,869
8. Upper Nile . .	6,000	1,059	3,800	—	7,500	2,890
9. Equatoria . .	16,260	235	10,500	—	18,698	12,583
Total . .	137,260	31,081	125,100	—	142,198	131,342
TOTAL SAKEL AND AMERICAN . .	441,378	67,573	1,171,314	—	426,818	1,272,692

*Includes Khartoum Estates.

One Kantar = 99.051 lbs. = 44.93 kilogrammes.

RUMANIA

According to a statement in the *Egyptian Gazette*, the Rumania authorities have placed at the disposal of the Textile Bureau a credit with which to acquire cotton-seed, and to facilitate credit and propaganda.

The area devoted to the cultivation of cotton in Rumania, which was increased from 4,500 acres in 1937 to 15,000 this year, is to be enlarged still further to 75,000 acres.

The output this year will cover 5 per cent. of the country's requirements, so presumably about a quarter of Rumania's cotton needs will be home supplied in 1939, though whether the scheme will extend to an area in the world in which cotton is an economic crop is dubitable in these years of large United States cotton surpluses.

The difficulties encountered in exporting the grain crops has encouraged the increase of cultivation of other crops in Rumania.

ST. VINCENT

It was reported in October that the market continued very dull, the possibility of large supplies of Sea Island cotton at low prices from Florida having encouraged buyers to hold off British West Indian cotton.

The close season terminated on August 15, 1938, and sowing of the 1938-39 crop began on August 16. The poor market appeared to have restricted the area under estate cultivation but did not appear to have any such effect on the peasant area, and it was not anticipated that there would be an appreciable decrease in the area as compared with the 1937-38 crop.

The weather was reported to have been continuously rainy and not very favourable for cotton growing. Germination was more than usually patchy and in many cases large areas had to be replanted more than once. Subsequent growth was at first very good, but afterwards the plants were showing the effect of the very rainy weather and growth slowed up considerably.

(*International Institute of Agriculture*)

UGANDA

H.M. Eastern African Dependencies' Trade and Information Office has received a report from Uganda regarding the cotton crop, in which the estimated acreages planted are as follows:—

					Planted to end September 1938	Total 1937 Acreage
Eastern	..	..	..	..	594,017	671,195
Buganda	..	..	..	..	716,203	878,674
Northern	..	..	..	..	183,767	194,379
Western	..	..	..	..	8,348	14,909
Total	..	..	..	..	1,502,335	1,759,157

The above figures of estimated acreages planted to end of September, 1938, are in some cases based on last season's mean plot size and are subject to revision. The favourable weather conditions which were general during September have more than maintained crop condition and present indications are that yields will be up to average.

U.S.S.R.

Picking was more rapid than last year. By November 1, State cotton purchases had reached 86.4 per cent. of the Plan against 70.0 per cent. at the same date last year. In many republics yields of unginned cotton per acre were even better than those secured last year. In Khirghiz, which by November 1 had exceeded the Plan by 12 per cent., the yield per acre was 1,290 lb. of unginned cotton compared with 760 lb. last year. In Armenia and Turkmenistan yields per acre varied around 1,115 lb. The cotton area planned this year was 156,900 acres for Khirghiz, 40,800 acres for Armenia and 374,900 acres for Turkmenistan. The Republics of Tajikistan and Armenia have executed their picking plan completely and punctually. Turkmenistan had accomplished 96 per cent. of it and Azerbaijan and Georgia about 80 per cent. In Uzbekistan, the main cotton area of the Union, 85 per cent. of the picking plan had been executed.

In the rain-grown cotton areas, Crimea had picked 86 per cent. and Ukraine, where yields are high, 83.6 per cent. Picking was late only in the North Caucasus. In the Ordjokiniz area, 49.8 per cent. had been picked and in the Krassnoder region 53.7 per cent.

(International Institute of Agriculture)

YUGO-SLAVIA

The October rains made little change in the situation of the cotton crop which had suffered from drought earlier in South Serbia, the chief producing area. Yields will consequently be lower but owing to the expansion in the cultivated area the total crop will be almost equal to last year's.

(International Institute of Agriculture)

COTTON GROWING IN MANCHURIA

The following article by Mr. Owen L. Dawson, U.S. Agricultural Commissioner, Shanghai, China, appeared in *The Journal of Commerce and Commercial*, New York.

Raw cotton production in Manchuria for the coming year is expected to be slightly above the average. Normally such a production would supply around 20 per cent. of the total cotton requirements both for spinning and in the form of imported piecegoods. The imports of cotton piecegoods as well as yarn which come mostly from Japan, according to a recent decree in Japan, cannot now be exported to Manchuria. This leaves a large deficit to be filled by domestic mill consumption either by importing more raw cotton or through additional imports of piecegoods from sources other than Japan. It is not believed much additional imports of raw cotton or non-Japanese piecegoods can or will be allowed owing to difficult exchange and trade conditions in which Manchuria is involved with Japan as part of the yen bloc.

The 1938 cotton crop in Manchuria, according to the plan of the Government at Hsinking, was set at the high figure of 117,574 bales of 500 lbs. net from a planned area of 302,142 acres, showing thereby an increase of 36 per cent. in production and 21 per cent. in acreage as compared with last year's second forecast of 86,640 bales from 249,878 acres. The greater rate of increase in production than in acreage is the result of an estimated material increase in planting of the foreign variety of upland and improved cotton on account of the higher lint percentage as well as their better yield.

PUT CROP AT 100,000 BALES.

The above planned acreage for the 1938 crop as given out by the Division of Agriculture in Hsinking is believed to be much too optimistic and estimates are expected to show greatly reduced figures. Our tentative estimate places the product on at 100,000 bales of 500 lbs. net and the acreage at 112,000 hectares, or 276,752 acres.

The steady increase in cotton acreage in Manchuria has been the outcome of a policy adopted by the Manchurian Government, the chief object of which is to supply the Japanese-owned mills in Manchuria with raw material, and earlier some believed a surplus could be produced for export to Japan. In 1933, a twenty-year cotton plan was initiated to increase the production to 150,000,000 kin of lint from an acreage of 300,000 cho. (One kin equals 1·32275 lbs. One cho equals 2·4507 acres.) Since 1937, however, the scheme has been supplemented by the cotton cultivation programme set forth in the so-called "Five-Year Industrial Plan."

This programme aims at a production of 75,000,000 kin of lint from an acreage of 150,000 cho after 1941. In the terms we have been using, the production aimed at is 198,413 bales of 500 lbs. net, and the area 367,605 acres. Although this plan has recently been modified to a great extent with regard to other industries, with a view of coping with the extraordinary situation created by the Sino-Japanese "Incident," it is understood that so far the part concerning cotton cultivation has remained unchanged.

BETTER CULTIVATION SOUGHT

Like its predecessor, the twenty-year plan, the present programme is exposed to much doubt as to its feasibility. In the first place, the hoped-for yield is the same as that in the former plan, *i.e.*, 269·9 lbs. per acre. This is deemed too high. However, calculations seem to be based on the assumption that upland cotton will be substituted for the native variety which is much inferior with regard to both yield and lint percentage. The weather conditions of Manchuria are not well adapted to consistent cotton cultivation, especially for improved upland varieties.

Strenuous efforts have been exerted in the past by both the Manchuria Cotton Association and the Manchuria Cotton Company, to realise the desired increases. The function of the former was to train experts, dispatch them to the rural districts as advisers, run seed-farms, encourage the establishment of co-operatives and give advice on their management; while the latter encouraged cotton cultivation by dis-

tributing seed of superior strains and insured the sale of cotton produced by buying it from the growers.

According to the American Consul at Mukden, it was reported on April 21, that the Manchuria Cotton Company had borrowed 1,500,000 Manchurian yuan from the Central Bank of Manchou to be expended for the distribution of seed to cotton farmers and advancing funds to them during the growing season. This company is also reported by the press to have transferred some of its shares to each of the prefectural agricultural associations for raw cotton cultivation, in order to promote co-operation with those organs, and to have decided to furnish them also with a fund amounting to 2,500,000 yuan, required for cotton production, through the Central Bank of Manchuo.

DISTRIBUTION CONTROLLED

Furthermore, the company will establish seventy purchasing and selling offices for raw cotton in the provinces where there are cotton agricultural associations. The company is also said to be contemplating to establish or enlarge seventeen cotton-ginning plants. The fund required for their establishment or enlargement is likewise estimated at 2,500,000 Manchurian yuan. Construction work on the ginning plants will be completed by the beginning of October, the harvesting month for raw cotton.

The Manchurian Government has also done much toward the improvement of cotton. On October 7, 1937, a law was promulgated to bring cotton under control. This law is known as the Manchurian Cotton Control Law, and it is intended to promote both the quality and production of cotton, and to control its cultivation and distribution. According to this law, unginced cotton shall be purchased by only those who are appointed by the Minister of Industries and the purchases shall be made at the price, time and place fixed by him. Restrictions are also laid on the use of the seed for planting, the exportation and importation of raw cotton, etc.

With the promulgation of the above mentioned law, the Manchuria Raw Cotton Association was liquidated and agencies were set up for guidance and promotion in growing cotton, unified under the Government. The Manchuria Raw Cotton Co. was reorganised in accordance with the same law. It is also now reported that the Cotton Spinners' Federation, a private group in Manchuria, will soon be reorganised into a semi-governmental organ in order to facilitate the application of the control over the cotton spinning enterprises there.

CONSUMPTION REQUIREMENTS

All the experiment stations in the South Manchuria Railway Zone formerly run by Japanese have been handed over to the Manchurian Government as a result of the conclusion of an agreement to abolish the extra-territorial rights of Japanese in Manchuria. This is, however, merely nominal and does not affect the personnel and management of such institutions to any noticeable extent.

The average raw cotton requirements of Manchuria for the six years 1932-1937 amounted to no less than 390,000 bales of 500 lbs. net, while

the average of the cotton crops for 1931-1936 was only about 64,000 bales. The large deficit has been made up of imports in various forms, such as raw cotton, cotton waste, cotton wadding, cotton fly, yarn, thread, piece goods, and other cotton products. The large imports of cotton manufactures have come almost entirely from Japanese mills in Japan and China, and are not expected to be superseded to any large degree by production from domestic mills as it is not believed the Government will sanction a large expansion of the local spinning industry in the future.

The striking feature is the steady increase of the total requirements, setting out at the low figure of 260,836 bales in 1932 and reaching the peak of 568,057 bales last year. Neither of these can be normal; for the year 1932 was still suffering from the "Manchurian Incident" which broke out on September 18, in the previous year, while the unusually large imports made last year are mostly interpreted as excessive purchases stimulated by the indications of a Government control of the cotton trade. However, a decided increase in the requirements is believed to have been steadily going on inasmuch as the population of Manchuria has advanced from 29.6 million as of December, 1932, to approximately 40 million at the present time. There has also been a marked increase in industrial activity during the period which resulted in more active employment and increased purchasing power.

As to the outlook for 1938 requirements, it is expected that a material reduction will occur. In the first place, the imports of raw cotton for the year have been restricted to 20,000,000 yuan by value. The imports of cotton manufactures will also show a pronounced decrease due to Government control. Furthermore, it is reported by Consul General Makinson at Osaka that an ordinance becoming effective June 29, 1938, prohibits the export of pure cotton or mixed staple fibre—cotton yarn or cloth from Japan to Manchuria as well as the Kwantung Leased Territory and China.

The general policy which the Manchurian Government has been following in order to avoid any conflict in cotton spinning between Japan and Manchuria, is not to increase cotton textile output nor to establish new cotton spinning mills in Manchuria. On May 1, 1937, a law regulating important industries was promulgated.

This law covers both the cotton spinning and cotton weaving industries (weaving by hand-loom excluded) and requires every spinner or weaver to obtain permission from the State Minister concerned to establish his mill. He also has to obtain permission from the Government when he desires to enlarge his equipment for production or effect a change therein.

He is required to carry out all orders that are considered necessary by the Minister concerned for upholding the public interest, or for exercising control in connection with his business. On August 24, in the same year, a law of practically the same nature was promulgated for the Kwantung Leased Territory in order to include those mills which are located outside the boundary of "Manchoukuo." It is again reported by the press, that steps will be taken soon to strengthen the control over the cotton spinning enterprises in "Manchoukuo" by reorganising the existing Cotton

Spinners' Federation from a private group into a semi-governmental organ which will facilitate the smooth application of the control law.

There has been no increase in the number of cotton mills in Manchuria since 1932. The equipment of the mills, however, has been steadily increasing during the past five years, according to the latest information obtained.

UGANDA COTTON COMMISSION

The appointment of a commission to inquire into and make recommendations for improving the organisation and regulation of the cotton industry in Uganda was announced in July. The inquiry began in August, the commission addressing itself at once to hearing evidence on the questions of price formula, reducing the number of redundant ginneries, arranging for ginning to be done on commission for growers, and marketing. The commission has now sent an interim report to the Governor, Sir Philip E. Mitchell. Its examination of the price formula is not yet complete, but as the fixing of minimum prices to be paid during the 1939 season is a matter of urgency the members recommend that the formula and procedure of 1938 should be adopted for 1939 except that they consider the differential established in the West Nile-Madi zone should be re-examined. Witnesses had suggested that the figure of 30.5 per cent. for the ginning outturn used in the formula was too high, and the commission recommends that a series of large-scale tests should be made during the 1939 ginning season. It further recommends that price-fixing formula be published and that the existing maximum ginning charge of 10 cents per pound should be maintained. With the object of reducing malpractices current in the purchase of raw cotton the commission recommends the establishment of a central registry for cotton buyers and that only registered persons be allowed to buy. Each registered buyer should be provided with a certificate bearing his photograph and signature or thumbprint, certificates to be renewed annually. The commission further recommends the substitution of 100 lb. for 80 lb. in the section of the Cotton Ordinance dealing with the maximum weight of cotton in bags. As a measure of immediate relief the cotton export duty should be reduced at once to 1 cent per pound. Railway freights on lint are substantially higher than the industry can bear under existing conditions and the members suggest that the Kenya and Uganda Railway Administration should grant concessions sufficient to give encouragement to growers even if they involve temporarily appreciable loss of revenue.

(Manchester Guardian)

EXPORTS OF COTTON FROM EAST AFRICA, JANUARY-JULY 1938

As far as can be ascertained the following was the final destination of cotton exported from East Africa during the period January-July 1938.

(Comparative figures for the two preceding years are also given)

	January-July		1936
	1938	1937	
	bales	bales	bales
United Kingdom	28,119	18,095	34,287
India	302,109	231,845	138,352
Japan	24,063	88,898	117,591
Other Countries .. .	11,266	15,342	20,382
Total Exports *	365,616	354,551	312,080

* Note.—Cotton exported from Tanganyika to Kenya at the end of a year and re-exported from Mombasa early in the following year appears in the countrywise figures of the latter year but not in the total exports. This explains the apparent discrepancies in the statement above.

(Cotton, Manchester)

PORTUGUESE COLONIAL COTTON PRODUCTION

The Government of Portugal has recently adopted two new measures to encourage increased production of cotton in the Portuguese colonies, according to a report received by the Bureau of Agricultural Economics from the American consulate general at Lisbon.

The first of these establishes a corporative organisation, the Colonial Cotton Export Board, to supervise and regulate all cotton exports from the colonies. Under that law, no cotton can be exported from the colonies without a certificate issued by the Board. The objective is to bring about improved quality and better classification of colonial cotton.

The second decree establishes a minimum price for colonial cotton. This price for 1938-crop cotton has been fixed at 7.50 escudos per kilogram (15 cents per lb.) for first-quality and at 6.80 escudos per kilogram (14 cents per lb.) for second-quality lint.

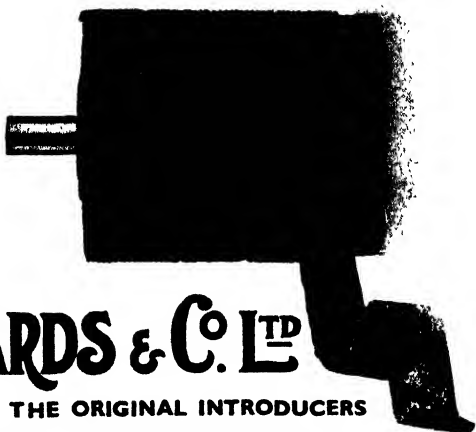
The decree also provides that, should the landed costs of American cotton in Portugal be lower than the fixed prices for the colonial product at the time of sale in the Portuguese market, the difference is to be refunded to the purchaser of the colonial cotton by the Cotton Board. To provide funds for the payment of this subsidy, the decree establishes a tax of 0.50 escudos per kilogram on all foreign cotton imported into Portugal.

It is also provided that growers may sell their cotton direct to the Board rather than in the free market. If buyers refuse to purchase such cotton, the Board is authorised to arrange for its compulsory distribution among registered importers on a quota basis. The importers must purchase it at fixed prices.

(*Foreign Agriculture, published by the U.S. Dept. of Agriculture*)

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DECEMBER CROP REPORT

The preliminary final estimate for this season's American cotton crop, issued on December 8, 1938, by the Washington Department of Agriculture, indicates a production of 12,008,000 bales (exclusive of linters). This is 129,000 bales smaller than the estimate issued in November, and compares with 18,946,000 bales and 12,399,000 bales harvested in the two previous seasons. The average yield per acre is now estimated at 226.8 lb., against the previous estimate in November of 219.7 lb. and 266.9 lb. and 197.9 lb. for the two previous crops.

The harvested acreage is returned at 25,346,000, which compares with 34,001,000 acres last year and 30,028,000 acres in 1936, the average abandonment this year being estimated at 3.1 per cent. against 1.3 per cent. last year and 2.8 per cent. in 1936. The Bureau states that the acreage abandonment in 1938 was greater than an average, some acreage having been removed by farmers after July 1 in order to comply with the agricultural programme. The average weight of the bale is estimated to be 514.2 lb.

The following table gives details with comparisons (in thousands):—

		1938	1938	1937	1937
		Harvested	Yield	Harvested	Yield
		acres	bales	acres	bales
Missouri .. ..	..	368	337	558	404
Virginia .. ..	..	40	15	66	43
North Carolina ..	..	857	400	1,103	780
South Carolina ..	..	1,253	650	1,695	1,023
Georgia .. ..	..	2,064	857	2,661	1,500
Florida .. ..	..	85	25	118	40
Tennessee .. ..	..	791	487	989	661
Alabama .. ..	..	2,128	1,080	2,694	1,631
Mississippi .. ..	..	2,600	1,715	3,467	1,692
Arkansas .. ..	..	2,388	1,340	3,062	1,904
Louisiana .. ..	..	1,224	676	1,569	1,104
Oklahoma .. ..	..	1,732	570	2,372	773
Texas .. ..	..	9,153	3,125	12,339	5,154
New Mexico .. ..	..	99	95	159	163
Arizona .. ..	..	205	196	299	313
California .. ..	..	336	423	620	738
Other States .. ..	..	23	17	30	23
Total .. ..	..	<u>25,346</u>	<u>12,008</u>	<u>34,001</u>	<u>18,946</u>

MID-JANUARY COTTON GINNING REPORT

The report issued January 23 by the Census Bureau shows that up to the close of business on January 15 a total of 11,558,000 bales of the 1938 American cotton crop had been ginned. This compares with 17,644,000 bales to the same date last year and 11,956,000 bales two years ago. The amount ginned since the previous report, which was made up on December 13, is 144,000 bales, against 841,000 bales in the corresponding period last season and 257,000 bales in the season before. Included in the total are 158,000 round bales, 5,000 bales Sea Island, and 19,000 bales American-Egyptian, against 316,000 round bales, 4,000 bales Sea Island, and 10,000 bales American-Egyptian shown in the corresponding report last year.

The following table gives details of ginnings with comparisons :—

	1939	1938	1937
Alabama	1,063,000	1,560,378	1,132,894
Arizona	177,000	266,049	172,015
Arkansas	1,300,000	1,730,004	1,260,708
California	389,000	655,702	402,551
Florida	22,000	35,283	27,631
Georgia	848,000	1,464,778	1,073,999
Kentucky	12,000	14,559	10,425
Louisiana	651,000	1,039,909	741,588
Mississippi	1,656,000	2,419,447	1,854,134
Missouri	330,000	359,743	299,082
New Mexico	91,000	146,190	104,039
North Carolina	393,000	768,063	562,009
Oklahoma	545,000	735,219	288,011
South Carolina	638,000	985,656	767,190
Tennessee	472,000	599,504	420,848
Texas	2,958,000	4,822,962	2,808,365
Virginia	11,000	38,196	28,986
Other States	2,000	2,566	1,906
Total	11,558,000	17,644,208	11,956,381

A SUBSIDY ON U.S. COTTON EXPORTS?

The *New York Journal of Commerce* stated recently that, with marketing quotas for next year's cotton crop now assured, it has been indicated in Washington that proposals will be made at the next session of Congress to subsidise exports of the commodity and to extend the crop insurance law to cover it. Latest reports by A.A.A. showed that the vote favouring marketing limitations on the 1939 crop still ran over 84 per cent., and over the two-thirds majority necessary to make quotas mandatory.

Under the farm law a \$10 per bale penalty would be imposed on sales of cotton in excess of that grown on acreage allotment for next year.

It is expected that the 1939 acreage allotment will be about the same as that for this year, 27,500,000 acres.

Meanwhile, friends of Senator Smith (Dem., S.C.), chairman of the Senate Agriculture Committee, said that he was planning to introduce a Bill at the next session designed to recapture foreign markets for American cotton. Although no details of the legislation were supplied, it was reported to be along the lines of some export subsidy programme.

Federal Crop Insurance Corporation officials have stated they expected the next session of Congress would extend the programme now in effect for wheat to cover cotton.

In order to be ready for this contingency they stated, research has been under way for some time. Should Congress give orders to proceed with insurance for the commodity the corporation will have a good actuarial foundation, and in addition the experience in handling wheat insurance this year.

Officials explained that cotton insurance will be more complicated than that for wheat because the former crop involves more of the human element. Where the making of the wheat crop is a matter of fate once the seed is in the ground, methods of cultivation and care given the crop has much to do with resulting cotton yields. It is expected that if the cotton insurance programme is provided for, about 1,000,000 bales of Government loan cotton will be set aside for a reserve to start the programme.

POSITION OF COTTON CO-OPERATIVES

Mr. Norris C. Williamson, President of the American Cotton Co-operative Association, stated at the Cotton Conference of the American Farm Bureau Federation, held recently in New Orleans, that if the U.S. Government is definitely committed to a policy which makes it impossible for co-operatives to continue their operation or which makes them unnecessary, the members should know it so that orderly dissolution may be effected without serious loss to farmers.

"If the declared policy of Congress since 1923 to foster and promote co-operative marketing organisations among farmers is to be continued, then any plan for handling farmers' crops outlined by laws passed by Congress should be consistent with such policy," he said.

"While everyone knows that a Government loan on cotton or other crops at or about the market value will make it difficult if not impossible for co-operative marketing associations to grow and prosper, it is not with this thought uppermost in mind that I approach discussion of the cotton problem, because the interest of the men and women who produce cotton must always be considered above everything else.

"If the Government's policy offers more to farmers throughout the years to come than any organised effort on their own part, then they need no co-operative marketing organisations through which to sell their crops."

Mr. Williamson asserted the farmers must know whether such a policy is to be "permanent or whether if we abandon our own marketing organisation the Government might in a few years change its policy and the farmers be left again in the hands of middlemen and speculators."

ACTIVITIES OF THE NATIONAL COTTON COUNCIL

Speaking before an emergency meeting of the National Cotton Council, held recently at Memphis, Mr. Oscar Johnston, a Mississippi planter and former A.A.A. official, attacked the acreage reduction programme as impractical. He called the programme a failure because it displaces land and labour and opens markets to "synthetic fibres" which are supplanting cotton. He said that in America alone 400,000,000 lbs. of substitutes for cotton staple would be used within the next twelve months. He referred to paper and rayon and other cotton substitutes made from wood.

Describing cotton as the nation's foremost economic problem, Mr. Johnston told more than 200 representatives of the cotton industry from fifteen States that there was only one sound solution to raise the low price and to liquidate the record surplus of the staple.

"That solution," he said, "is increased consumption, and the first step is to begin at home. Our domestic market can be expanded if chemists and scientists apply their knowledge to finding of new uses."

He said vanished foreign markets could be regained through an intelligent tariff programme. He warned that trade barriers must be removed if America's cotton is to regain its markets in foreign countries.

The delegates approved a five-point programme proposed by Mr. Johnston to promote use of cotton. It included:—

1. An intensive domestic advertising campaign.
2. Cultivation of goodwill toward American cotton in foreign markets.
3. Stimulation of international commerce with industrial nations.
4. Scientific research for discovery of new uses and for improvement of manufacturer products to increase consumption in known uses.
5. More equitable and favourable transportation rates between the cotton belt and other sections of the nation.

U.S. 1939 ACREAGE ALLOTMENT

The national acreage allotment to cotton for 1939 was announced recently by Secretary Wallace as between 27,000,000 and 29,000,000 acres. This is about the same allotment of acreage to cotton as was set up for the 1938 crop. In 1938 cotton growers failed to use the total acreage being estimated at 26,904,000 acres. Some opinion has it that the 1939 cotton acreage may fall even below that planted in 1938 due to the unfavourable price situation and to farm labour being engaged on Relief Projects. Other factors enter the cotton acreage picture, such as air photographs, which make it impossible for growers to evade the penalty for overplanting and the fact that all growers have to consult with their county agents who keep them informed about the supply and demand situation. Therefore, early indications point to an acreage considerably smaller than that planted in 1938.

NATIONAL COTTON ALLOTMENTS PROCLAMATION

Secretary of Agriculture, Henry A. Wallace, issued his proclamation on the national allotment of cotton for the calendar year beginning January 1, 1939, on November 9, 1938. After reciting the text of sections of the Farm Bill calling for such proclamation, the proclamation concludes :

Now, therefore, be it known that I, Henry A. Wallace, Secretary of Agriculture of the United States of America, acting under and pursuant to, and by virtue of, the authority vested in me by the Act of Congress known as the Agricultural Adjustment Act of 1938, as amended, upon the basis of the latest available statistics, of the Federal Government, do hereby find, determine, and proclaim under sections 342, 343, and 345 of said Act :

(1) That the "total supply" of cotton as of August 1, 1938, was 25,250,000 running bales ;

(2) That the "total supply" of cotton for the marketing year commencing August 1, 1938, is 25,702,000 running bales ;

(3) That the "normal supply" of cotton as of August 1, 1938, was 18,200,000 running bales ;

(4) That the "carry-over" of cotton as of August 1, 1938, was 13,652,000 running bales ;

(5) That the "probable domestic consumption of American cotton" during the marketing year commencing August 1, 1938, is 6,500,000 running bales ;

(6) That the "probable exports of American cotton" during the marketing year beginning August 1, 1938, is 5,000,000 running bales ;

(7) That the estimated "carry-over" of cotton as of August 1, 1939, is 14,200,000 running bales ;

(8) That the "total supply" of cotton for the marketing year beginning August 1, 1938, exceeds by more than 7 per centum the "normal supply" of cotton for such marketing year; and

(9) That the national allotment of cotton for the calendar year beginning on January 1, 1939, shall be 10,000,000 standard bales of 500 lbs. gross weight, increased by that number of standard bales of 500 lbs. gross weight equal to the production in the calendar year 1939 of that number of acres required to be allotted for 1939 under the terms of subsections (e), (g), and (h) of section 344 of said Act.

Done at Washington, D.C., this 9th day of November, 1938. Witness my hand and the seal of the Department of Agriculture.

NEW ORLEANS COTTON EXCHANGE URGES FIVE-POINT COTTON PROGRAMME

The Board of Directors of the New Orleans Cotton Exchange, in their annual report published recently, offered five basic principles which might furnish a solution for the cotton problem. It advocated first, that compensation in some way be given the farmer who buys in a protected market and sells in a free market, second, that crop control be continued until the present surplus is cut; third, that Government cotton loans be scrapped and a plan be set up for the farmer to sell at a world price and receive adjustment payments, fourth, that farmers be compensated in the event of a disastrously short crop when acreage is restricted; and fifth, that a plan be evolved for liquidation of Government financed cotton through the cotton trade rather than through a Federal agency.

"Your board of directors feels," the report stated, "that if the present plan of crop control, in all its ramifications, is to continue, the South is facing, if not the greatest economic crisis since the Civil War, certainly a readjustment of the most serious magnitude which vitally affects not only the cotton industry and its people, but the entire nation."

"We are at the crossroads. Are we going to give up our foreign markets and plan only for domestic use? Or are we to regain our world markets and again take our place as the greatest cotton producing country?"

The report added that it was in no sense a criticism of the Secretary of Agriculture or his department, holding that the secretary's "hands are at times politically tied."

COTTON COVERING FOR ONE-VARIETY COMMUNITY COTTON

Reference was made in the October 1938 issue of the *International Cotton Bulletin* to the marketing plan approved for One-Variety cotton by the United States Agricultural Adjustment Administration. Under the programme, a total of not more than 20,000 bales of American cotton

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will be selected from One-Variety Communities and carefully ginned and baled. It will be sold to foreign spinners in lots assembled from the same One-Variety area. Amongst other advantages possessed by this cotton will be that the entire 20,000 bales will be baled in cotton cloth covering instead of jute, and it is reported that, in the case of these bales, samples will be taken at the gin in order to eliminate cutting the bagging.

We further stated in the course of the article referred to above, that the Agricultural Adjustment Administration had accepted an offer made by a cotton mill in the Southern States for the manufacture of one million patterns of cotton bagging, to be used as a covering for cotton bales under the Agricultural Adjustment Administration's diversion programme.

As has been previously stated, however, the present One-Variety Cotton Marketing Plan is confined to a total of twenty thousand bales for the time being, so that if spinners receive bales covered in cotton covering, it does not necessarily follow that these are One-Variety Community bales. We wish to make this point quite clear, in view of our having referred to both these points under one heading in the October 1938 issue of the *International Cotton Bulletin*.

WILT RESISTING COTTON IN U.S.A.

According to the *Cotton Trade Journal*, of New Orleans, a new variety of cotton that appears to be very resistant to the fusarium wilt, a disease prevalent in the delta section of Louisiana, and to which many long staple cottons are subject, has been developed by D. C. Neal, senior plant pathologist, United States Department of Agriculture, assigned to Louisiana, and C. B. Haddon, superintendent of the North-east Louisiana Experiment Station at St. Joseph.

The Delfos 2323-965-425 may not even be a new variety since it is a selection of Delfos cotton made at the North-east Station in 1934. The selection was made from a plant of Delfos 2323-965 growing in a wilt-infested plot. Since then this variety has exhibited marked resistance to the wilt in tests conducted for the past three years on heavily infested wilt plots at Baton Rouge.

In a test of sixteen varieties of cotton in 1936 for wilt resistance, it was noted that this selection was one of the most outstanding wilt resistant varieties, and its productivity was also fairly good. In a further test of ten new strains and hybrid cottons for wilt resistance in 1937, the Delfos 2323-965-425 remained almost free of wilt throughout the season, showing as late as September 8 only .5 per cent. infection in a total of 600 plants, states Mr. Neal.

In this latter test, half-and-half, a susceptible variety, with a total of 516 plants growing, developed approximately 65 per cent. infection. In one series comprising row sections 100 feet long, in which the half-and-half was compared with the Delfos, the former variety developed 100

per cent. infection by September 8, while the Delfos selection remained entirely healthy.

Mr. Neal states this cotton variety has produced over 1,100 lbs. of seed cotton per acre at Baton Rouge, following applications of nitrogen, phosphorus and potassium fertiliser. At the North-east Louisiana Delta Experiment Station, where it was included in tests for the first time last year, the yield of this variety was in excess of a bale to the acre. The plant is fairly representative of the Delfos 6102 type in growth habits, rapidity of fruiting, boll size, and fibre properties.

Very little of the seed of this strain is available at the present time, states Mr. Neal. However, plans are being made to increase it as rapidly as possible for release to growers in the wilt-infested areas of the Delta. Sufficient seed should be available next year for planting approximately 150 acres of this selection.

TEXAS COTTON IMPROVEMENT

Less than 5 per cent. of the almost two million bales of cotton ginned in Texas prior to October 1 is untenderable, as compared with 22 per cent. for the same period in 1937.

The same improvement was noted in the increased percentages of the more desirable staple lengths, figures quoted by E. A. Miller, agronomist of the Texas A. & M. College Extension Service, from U.S. Department of Agriculture Bureau of Agricultural Economics estimates, show :—

Almost 25 per cent. of the cotton ginned before October 1 was an inch or longer in staple as compared with only 8 per cent. last season, Miller said.

Approximately 47 per cent. was 15/16 and 31/32-in. and 23 per cent. was $\frac{7}{8}$ and 29/32-in. While less than 28 per cent. was shorter than 15/16-in. 58 per cent. was of these lengths for the same period a year ago.

Grades ran from about the same as in 1937 to a little higher. The estimates indicate that 38 per cent. was Strict Middling White or better as compared with 32 per cent. last year, and that more than 71 per cent. of the cotton ginned up to October 1, 1938, graded Middling White or better.

"Not all of the credit for the increase in staple length can be given directly to the 213 one-variety cotton associations through which 632,897 acres, or about 6 per cent. of the 1938 Texas crop, were planted to quality cotton," the agronomist pointed out. "County agricultural agents tell me that many farmers, as individuals, planted better cotton than previously as a result of the cotton improvement campaign. These farmers, even if they did not always get paid on a quality basis as did the association members, at least made a substantial contribution to the improvement of Texas cotton."

(Acco Press, Houston)

THE U.S. COTTON SITUATION

The following is extracted from the November 1938, issue of the review of the National City Bank of New York :—

The cotton crop this year, estimated at 12,200,000 bales, is a short one, according to past experience. In ten of the twelve seasons ending with 1933-34, a period of varied business conditions, it would have been smaller than the world consumption of American cotton, and would have commanded a satisfactory price. Yet Mr. Wallace was doubtless correct in stating in his cotton speech at Fort Worth that without the loan and acreage programme, the price this year would be down to 4 or 5 cents a lb.

The world carryover of American cotton at the beginning of the present season was 13,652,000 bales, according to the New York Cotton Exchange. Approximately 7,000,000 bales were held in the Government loan stock. The remaining free carryover of 6,650,000 bales was abundant but not depressingly large according to past standards, and the total available supply, consisting of the free carryover plus the crop, or 18,850,000 bales, would have been considered a bullish figure in the '20s. However, the price declined early in the season to a level at which, under the law, another Government loan became mandatory. The loan was set at 8.30 cents for middling $\frac{3}{8}$ in. in the Southern markets, with suitable differences for other grades and staples, and cotton has moved into it at a rate far above the official predictions. Up to October 27, 1,800,000 bales had been counted in the loan. Cotton merchants are estimating that a total of at least 3,000,000 bales will move into it, reducing the "free" crop to around 9,000,000 running bales, or the total free supply for the season to about 15,850,000. This supply can be augmented by bidding the price up to a point where withdrawals from the loan stock will be induced. Until that is done, however, the supply available to spinners is the smallest with one exception in 15 years.

It is something to ponder that, with the situation shaping in this way, there have not been enough buyers willing to pay even the loan price for cotton; and that one-fourth of what a few years ago was a short crop will lodge in the loan stock. There has never been more striking proof of the change that has taken place, within a very few years, in the demand for American cotton. Total world cotton consumption has made great gains since 1929, and if American cotton had held a reasonable proportion of this growth there would now be a shortage instead of a surplus. Comparing even the depressed 1937-38 seasons with 1928-29, world consumption of all growths was 1,000,000 bales greater. Consumption of foreign growths was 5,250,000 bales larger. But consumption of American was 4,250,000 bales smaller. The story is familiar; it is sufficient to say that a market for between three and four million bales of American cotton annually has been lost to foreign growths, in part because the price supporting policies of this country have encouraged other countries to increase their production.

If 3,000,000 bales go into the loan this season, the Government will hold 10,000,000 bales. Possibly some of the loan cotton will be needed by spinners next spring, and if so prices will advance and farmers will repossess and sell their cotton. However, repossessions can hardly be large enough to reduce the Government's holdings to any important extent.

COTTON PROVISIONS OF THE FARM ACT

What does the Agricultural Adjustment Act provide as the intended cure for this record unbalance between supply and demand? In the first place, "marketing quotas" will be continued as in 1938, subject to a two-thirds approval by farmers who will vote in a referendum to be taken December 10. The effect of marketing quotas is virtually to compel all cotton growers to abide by the Government's acreage allotments.

The Act provides that the cotton allotment for 1939 shall not be less than 10,000,000 bales, the same as for 1938. Acreage quotas therefore will presumably be about the same as this year, when the final allotment was 28,400,000 and the actual harvested acreage 26,449,000. The 10,000,000-bale minimum recognises that curtailment of the cotton area, which a few years ago totalled 45,000,000 acres, has gone about as far as is practicable, if the farmers of the Cotton Belt are to have any occupation left.

In practice, the Act promises to do little to relieve the Government of its prospective 10,000,000 bale stock. If the acreage of the next few years is about the same as this year, the average crop is likely to leave comparatively little room for sale of Government cotton, at least through the usual trade channels; and bumper crops in some years are certain. How long can the mandatory loan provisions of the Act stand up under this prospect?

This brief description should make it clear why Secretary Wallace holds out little hope of "parity income" for cotton farmers, except through continuous Government payments. The cotton growers this season conformed to the A.A.A. programme and cut their acreage 22 per cent. to the lowest figure in 38 years. Nevertheless, Mr. Wallace estimates their income for the present crop year at \$865,000,000 compared with \$982,000,000 last year; and this year's estimate includes about \$265,000,000 of Government payments compared with only \$64,000,000 last season. The over-all decline is not calamitous but the proportion of Government payments in the income should be a revelation.

The experience of the Federal Farm Board from 1929 to 1931 is usually pointed to as a classic example of futile effort to support a market by withholding stocks, and when the effort was abandoned, Mr. Carl Williams, one of the members, summed up the experience as follows:—

The Board has discovered, and hopes the American people have discovered, that continued purchases in the face of overproduction is not the remedy for the situation.

Yet the Farm Board at its peak never held 40 per cent. as much cotton as the Government is holding this season. It is now argued that the

Board failed because it lacked control of production, but the present regime has accumulated its stock while presumably controlling production, which seems to show that there are other errors in the calculations. It makes no practical difference that the impasse in which the cotton programme finds itself has been brought about not by price-fixing extremists, but by high-minded and trained men who have sincerely believed that there was a "middle way," between unrestricted production and export of cotton and production only for the domestic market, which would lead cotton to self-supporting prosperity. Each year that passes seems to give proof that the "middle way" is visionary, and that it is impracticable to curtail production commensurately with even the partial surrender of export markets.

Mr. C. T. Revere, the well-known American economist, writing in Messrs. Laird, Bissell & Meeds' weekly report dated November 18, 1938, states as follows :—

Broadly speaking, the objectives of the Agricultural Adjustment Act of 1938 are identical with those of last year, the design being to encourage soil conservation, provide for production that will meet domestic needs, indicated export requirements, and requirements for "an adequate reserve." The cotton acreage goal is set at from 27,000,000 to 29,000,000 acres. Co-operating producers will be entitled to conservation payments of 2 cents per lb. out of a total of \$500,000,000 to be distributed generally to co-operating farmers. In addition, cotton growers will be entitled to price adjustment payments out of a total fund of \$212,000,000, which is to be distributed to cotton, wheat, corn, tobacco, and rice producers. The rate for cotton ranges from 1.6 cents to 1.8 cents per lb. but the exact amounts cannot be determined until January 1, 1939. The referendum on quotas is announced for December 10, and it is expected that quotas will be endorsed by the plebiscite on that date.

Time alone can tell what progress toward the solution of the cotton problem will accrue from the adoption of this programme. Meantime, the trade is struggling with the distributive difficulties incident to the 1938 loan. Thus far, as a result of the workings of this plan, prices have been well maintained within a narrow range, the available supply is restricted, artificially, of course, and as a result of the unusually high quality of the present crop, certain low and medium grades are difficult to obtain.

Just how the domestic supply of "free" cotton will work out by the end of the season is largely dependent on the amount that will be impounded in the loan. At present, if one takes into consideration the total amount of cotton officially pledged, with the amount unreported, it seems reasonable to assume that around 3,000,000 bales have found their way into Government financial control.

If we take domestic mill stocks of approximately 1,500,000 bales, about 6,965,000 held in previous loans, and accept the estimate of 3,000,000 bales pledged, or practically pledged, in the current season's loans, we have approximately 11½ million bales removed from the available supply, thus reducing the amount of "free" cotton to about 9½ million

bales, compared with approximately 15,000,000 bales "free" for the corresponding period last year.

One problem before the trade, therefore, is how much more this aggregate of "free" cotton will be reduced by movement into the loan, and the extent to which this will cause tightness in the available supply. Much, it is needless to say, depends on the course of prices in the near future—whether the tendency will accelerate borrowing or whether it will induce more liberal selling, or re-possession of loan cotton for the purpose of sale.

No impartial observer will dispute the artificiality of this situation, and few will be inclined to venture the prediction of the outcome. Ultimately, however, it may prove that as a result of the loan programme, the cotton growers of the South through their friends in Congress have purchased temporary security at an unholy price.

Meantime, it is quite within the cards for trade price fixing to force prices higher. There has been an appreciable pick-up in the domestic textile industry and one most welcome development has been the appearance of demand by industry for goods of certain construction on a scale that has not been witnessed for fully a year and a half. With further revival in the heavy goods industries, there is no reason why this buying movement should not proceed, for at present levels neither cotton nor cotton goods can be regarded as over-priced, at least compared with quotations in recent years.

Nearby consideration naturally is being given to the status of December contracts with the first notice day falling on Friday, November 25. The position this year is rather unusual and, of course, proceeds largely out of the loan programme and the character of the current crop. The certificated stock has been dwindling gradually for a number of weeks and is now slightly below 46,000. The stock, which under Government classification may be regarded as tenderable, is believed to consist largely of medium and low grades, which are scarce and hard to buy in the general market. Ordinarily the stock might not be considered particularly desirable, but the relative scarcity of medium and low grades might make it easily marketable and represent an inducement for accepting tenders.

However, the stringency due to the operation of the loan and the seasonal scarcity of low grades must be regarded as representing largely a technical basis for the formation of constructive price optimism. The persistent shrivelling of exports, now approximating 900,000 bales below last season, and with world consumption of foreign cotton proceeding at a pace about one and a half times as much as the world consumption of American cotton, the difficulties confronting our own cotton growers multiply and deepen. Unquestionably, the solution does not lie along the line of methods that have been followed since the Federal Farm Board embarked on its ill-fated career.

Exports of cotton from the United States to date are a million bales behind those of the same date of last year. Normally the last two months are heavy shipping months, and there is still no signs that Europe intends to increase her takings of American cotton in the near future. Asia however, has actually imported more American staple to date when

compared with those of the same date last year. In spite of the reduced exports from U.S.A. it should be noted that India has increased her exports this season over those of the same period last season. In summarising the situation Mr. Alston H. Garside, Economist of the New York Cotton Exchange, states in his weekly report that the decline of exports to Europe is due not to decreased consumption but in a large degree to the large stocks at the beginning of this season, and he also points out that the heavy discounts on prices for distant delivery as compared with prices for nearer deliveries favour a decrease in these stocks.

We also extract the following from Mr. Garside's recent report :—

“ These discounts are attributed chiefly to the moderate amount of American cotton left in distributive channels after the diversion of cotton that has already gone into the Government loan stock, the uncertainty as to how much more cotton will go into the loan stock, the encouragement given by the loan to first hands in the South to hold cotton for possible entry into the loan stock later, and uncertainty as to the Government's cotton production programme for next year and as to whether there will be a loan on the next crop, and if so at what rate. Discounts on distant deliveries entail losses to holders of cotton as a rule. It is believed in some quarters that if wide discounts on distant deliveries are continued throughout the season foreign handlers of cotton will be led to reduce their stocks of American cotton to a minimum.

“It may be readily calculated that if handlers of American cotton in Europe should be led to reduce their stocks to low levels, and if the rate of consumption of American cotton abroad should not increase total exports by this country this season would fall below 4,000,000 bales. That would be the smallest export total in about half a century. Exports last season totalled 5,672,000 bales. This country used to export around 8,000,000 to 8,500,000 bales per season.”

It is believed that the total 1938 loan stock, including the unreported portion, is between 3,500,000 and 3,600,000 bales. That would make the grand total loan stock of the Government, including old crop and new crop cotton, around 10,500,000 to 10,600,000 bales. If the present farm law should be left unchanged, and if, to comply with its provisions, the Commodity Credit Corporation should be required next season to make another loan at or above market values, the loan stock could easily mount a year hence to a fantastic height. It is the realisation that that is so that is leading many in the trade to expect that Congress will modify the law at its next session. Secretary Wallace has stated that the choice before the growers is still further curtailment of acreage or a lower loan rate.

EMERGENCY POWERS VOTED BY NEW YORK COTTON EXCHANGE

Mr. J. L. Severance, in a recent issue of the *New York Journal of Commerce*, states that :—

Liquidation of cotton contracts at a fixed settlement price may be required on the New York Cotton Exchange in the event of an emergency

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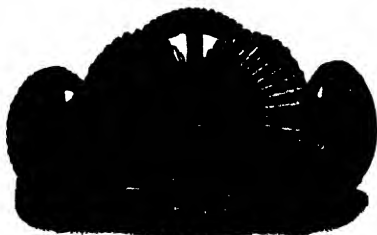
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situation arising, and the board of managers of the exchange has been empowered to declare such an emergency when and if it arises. New powers to such effect were accorded the board by a vote of the membership of the exchange held recently. The vote was 43 favourable to 2 opposed.

The new section added to the by-laws, entitled "Liquidation Required at Fixed Settlement Price," states that a majority of the entire board, or 10 out of 18 votes, may declare an emergency exists which makes contracts impossible of fulfilment, or their fulfilment contrary to public interest and the exchange's welfare. The board may then accord relief and may require liquidation of such contracts as it designates at a settlement price or prices which it may determine.

The emergency provisions may never be used but have been designed to meet conditions which from time to time have threatened. Once some years ago the Federal Government held a heavy long interest in the cotton futures market, an interest which threatened a very severe squeeze, but was persuaded to relax its hold. Squeezes have been witnessed in other markets. Memory of a situation in sugar which resulted from quota limitations which made delivery of sugar to fulfil contracts practically impossible is fresh in the minds of the cotton trade.

A further situation is the Government loan system which in an extreme could result in a difficult position. For instance, if cotton were otherwise unavailable due to loans and a short had arranged for Federal cotton to meet delivery requirements, but did not get it in time, a delivery default could occur. While prior exchange rules cover delivery defaults, the new rule would cover a general situation of this sort where the old was considered by some as inadequate.

The text of the new section of the exchange by-laws follows :—

"Section 118. If the board of managers in a meeting declares by a majority vote of the entire board that an emergency situation exists that makes certain designated open contracts on the New York Cotton Exchange impossible of fulfilment or that the fulfilment thereof may be prejudicial to the public interest or the equitable principles of trade or the welfare of said exchange, said board in said meeting or any adjournment or adjournments thereof may by a majority vote of the whole board accord relief in the manner and time as in its judgment such situation requires.

"Without in any way limiting the authority herein conferred upon the board of managers, the intention hereof is that in a situation provided for in the foregoing paragraph said board in meeting may by a majority vote of the whole board require the liquidation of such contracts that it may designate, in the manner and time and at such settlement price or prices as it may determine, with due regard for the rights of all interested parties. The measures that the board may invoke hereunder in such situation may be modified or revoked in whole or in part by a majority vote of the whole board in meeting assembled.

"Any member failing to conform to such regulations or measures, thus adopted, may be suspended from all rights of membership for a term not to exceed one year, or may be expelled from membership in the exchange by the board of managers."

Tenderability of American Upland Cotton on Hand in the United States, August 1, 1928-37

(Quantities are given in running bales, except that round bales are counted as half-bales. Linters are not included)

Year	Total American upland cotton on hand Aug. 1*			TENDERABLE†			UNTENDERABLE													
				Staple lengths ¾ to 1-1/32 inches			Staple lengths 1 1/8 inches and longer			Total untender- able			Untenderable in grade only			Untenderable in staple only			Untenderable in both grade and staple	
													1,000 bales	Per cent.	1,000 bales	Per cent.	1,000 bales	Per cent.		
1928 ..	2,419.8	100.0	2,198.0	90.8	1,459.5	60.3	738.5	30.5	221.8	9.2	134.0	5.6	51.7	2.1	36.1	1.5				
1929 ..	2,122.6	100.0	1,747.0	82.3	1,251.0	58.9	496.0	23.4	375.6	17.7	220.6	10.4	71.6	3.4	83.4	3.9				
1930 ..	4,313.6	100.0	3,416.3	79.2	2,666.6	61.8	749.7	17.4	897.3	20.8	450.5	10.5	268.4	6.2	178.4	4.1				
1931 ..	6,246.0	100.0	5,543.3	88.7	4,773.0	76.4	770.3	12.3	702.7	11.3	239.5	3.9	423.9	6.8	39.3	.6				
1932 ..	9,560.3	100.0	8,882.7	92.9	7,418.4	77.6	1,464.3	15.3	677.6	7.1	379.3	4.0	242.8	2.5	55.5	.6				
1933 ..	8,069.7	100.0	7,437.4	92.2	6,065.8	75.2	1,371.6	17.0	632.3	7.8	443.9	5.5	154.8	1.9	33.6	.4				
1934 ..	7,638.1	100.0	6,969.8	91.3	5,709.5	74.8	1,260.3	16.5	668.3	8.7	434.9	5.7	181.4	2.3	52.0	.7				
1935 ..	7,128.9	100.0	6,371.0	89.4	5,357.8	75.2	1,013.2	14.2	757.9	10.6	229.1	3.2	490.9	6.9	37.9	.5				
1936 ..	5,329.5	100.0	4,399.0	82.5	3,907.1	73.3	491.9	9.2	930.5	17.5	369.1	6.9	503.5	9.5	57.9	1.1				
1937 ..	4,381.8	100.0	3,458.2	78.9	2,805.2	64.0	653.0	14.9	923.6	21.1	317.0	7.2	467.0	10.7	139.6	3.2				

* As reported by the Bureau of the Census.

† Tenderable in settlement of futures contracts made subject to Section 5 of the United States Cotton Futures Act and the regulations of the Secretary of Agriculture thereunder.

Grade and Staple Length of American Upland Cotton ginned in the United States, by States, crop of 1937

(Quantities are given in running bales, except that round bales are counted as half-bales. Linters are not included.)

UNITED STATES.

Grade	All staple lengths 1,000 bales	Per cent.	Shorter than 1,000 bales	15/16 and 31/32-in. 1,000 bales	1 and 1-1/32-in. 1,000 bales	1-1/16 and 1-3/32 in. 1,000 bales	1 1/4 and 1-7/32-in. 1,000 bales	1 1/2 ins. and longer 1,000 bales
All grades	18,237.1	100.0	1,834.6	5,235.0	3,542.4	1,638.5	842.2	15.5
White	13,881.0	76.1	1,151.4	3,649.6	2,805.6	1,423.5	805.3	14.3
1-M.F.	—	—	—	—	—	—	—	—
2-S.G.M.	555.6	3.0	13.9	45.3	1	1	—	—
3-G.M.	2,655.3	14.6	200.7	656.8	47.2	192.9	211.1	3.2
4-S.M.	4,872.9	26.7	1,387.9	1,387.9	547.2	347.7	198.9	18.0
5-M.	3,704.4	20.3	310.0	1,094.0	1,072.6	337.7	198.9	3.9
6-S.L.M.	1,456.2	8.0	134.7	424.9	800.5	338.8	158.9	2.7
7-L.M.	486.4	2.7	52.3	128.2	430.2	141.6	43.1	2.2
8-G.O.	149.5	.8	11.2	25.7	152.4	38.8	7.5	.3
9-C.O.	4,091.9	22.4	644.2	1,501.8	55.6	10.7	1.3	.1
Spotted	81.3	—	9.5	28.9	1,089.5	196.0	35.7	1.2
3-G.M.	1,584.8	8.7	235.8	597.4	16.2	4.0	3	—
4-S.M.	1,663.7	9.1	217.9	607.6	255.7	90.3	12.9	2.5
5-M.	510.2	2.8	101.6	480.8	260.0	75.6	18.8	.7
6-S.L.M.	231.9	1.4	70.4	134.1	64.7	21.4	2.9	.1
7-L.M.	152.7	.8	26.4	62.4	21.4	4.7	.8	.2
Tinged	152.7	.8	26.4	55.6	16.5	2.7	.2	—
3-G.M.	1.7	—	—	.5	.6	—	—	—
4-S.M.	17.4	—	2.0	6.1	3.1	.5	—	—
5-M.	35.8	.2	3.1	14.5	3.8	4	—	—
6-S.L.M.	33.5	.2	8.3	11.5	2.6	.4	.1	—
7-L.M.	64.3	.3	11.0	22.9	6.4	1.4	.1	—
Yellow Stained	3.7	—	1.0	1.2	.2	—	—	—
3-G.M.	—	—	—	—	—	—	—	—
4-S.M.	.6	—	.1	.3	.1	—	—	—
5-M.	3.1	—	.9	.9	.1	—	—	—
Grey	15.4	—	—	.4	.7	—	—	—
3-G.M.	—	—	—	—	—	—	—	—
4-S.M.	7.0	—	—	.3	—	—	—	—
5-M.	8.4	—	—	.1	.7	—	—	—
No grade *§	92.4	.5	11.6	26.3	11.4	3.3	.6	—

* Untenderable in settlement of Futures Contracts made subject to Section 5 of the United States Cotton Futures Act, and the regulations of the Secretary of Agriculture thereunder. Of the 1,834,000 bales of shorter than 1-in. cotton 107,500 or 0.6 per cent were shorter than 13/16-in.

† As reported by the Bureau of the Census.

‡ Less than 0.05 per cent.

§ Includes bales not otherwise classified above.

QUALITY OF TEXAS CROP

It is possible now to give some figures on the quality of the Texas crop as compared with last season, and the report reveals great improvement in the staple. Here are the figures :—

Ginnings to November 1, 1938, and to October 28, 1937, reveal :—

	1938	1937
Shorter than $\frac{7}{8}$ -in.	8.7	15.2
$\frac{7}{8}$ -in. and 29/32-in.	29.9	47.9
15/16-in. and 31/32-in.	31.1	29.4
1 in. and 1 $\frac{1}{32}$ -in.	16.7	5.4
1 $\frac{1}{16}$ -in. and 1 $\frac{3}{32}$ -in.	3.9	1.7

This report of the grade and staple section of the United States Department of Agriculture reveals a much smaller amount of cottons under 15/16-in. in staple and much larger amounts of cotton from 15/16-in. upward. It reflects the results of strenuous efforts on the part of private organisations to improve the staple in Texas.

That the crop is virtually all ginned is apparent from the report recently published. The Government put the crop at 3,125,000 gross weight bales, which should result in just about 3,000,000 running bales. Nearly 2,600,000 bales were ginned up to November 1.

Generally speaking exporters are maintaining a hopeful attitude with regard to the future outlook. It is anticipated that with the rapid decline in the volume of ginnings from now on, the spot situation will become increasingly tight and that this will create a situation whereby it will be possible to do a better volume of business. That cotton must ultimately move out of the loan and into consumptive channels seems more than likely, although the extent of the volume is very difficult to figure.

SUPPLY AND DISTRIBUTION OF COTTON IN THE UNITED STATES

(Including " Free " Cotton and Government Cotton)

As compiled by the New York Cotton Exchange Service

	1934-35	1935-36	1936-37	1937-38	1938-39
Stock, August 1	7,648,000	7,137,000	5,336,000	4,387,000	11,446,000
Production	9,576,000	10,495,000	12,375,000	18,412,000	11,796,000
Total Supply	17,224,000	17,632,000	17,711,000	22,799,000	23,242,000
Consumption	5,241,000	6,221,000	7,768,000	5,616,000	
Exports	4,816,000	6,040,000	5,511,000	5,672,000	
Destroyed	30,000	35,000	45,000	65,000	
Stock, July 31	7,137,000	5,336,000	4,387,000	11,446,000	
Total Distribution	17,224,000	17,632,000	17,711,000	22,799,000	

Note.—Production figures are for ginnings within season plus city crop. Production figure for 1938-39 is based on Government crop estimate of October 8.

SUPPLY AND DISTRIBUTION OF AMERICAN COTTON OUTSIDE UNITED STATES

(Running Bales, Counting Round as Half Bales)
As compiled by the New York Cotton Exchange Service

Supply	1934-35	1935-36	1936-37	1937-38	1938-39
Stock, August 1 :—					
Great Britain ..	462,000	250,000	376,000	391,000	807,000
Continent ..	1,491,000	922,000	759,000	722,000	1,046,000
Orient ..	1,031,000	675,000	468,000	654,000	279,000
Canada, etc. . .	69,000	57,000	59,000	81,000	74,000
Total ..	3,053,000	1,904,000	1,662,000	1,848,000	2,206,000
Exports by U.S. :—					
To Great Britain ..	741,000	1,416,000	1,171,000	1,569,000	
„ Continent ..	2,145,000	2,782,000	2,403,000	2,869,000	
„ Orient ..	1,689,000	1,573,000	1,606,000	947,000	
„ Canada, etc. . .	241,000	269,000	331,000	287,000	
Total ..	4,816,000	6,040,000	5,511,000	5,672,000	
Total Supply ..	7,869,000	7,944,000	7,173,000	7,520,000	
Distribution					
Consumption :—					
By Great Britain ..	941,000	1,295,000	1,150,000	1,144,000	
„ Continent ..	2,739,000	2,963,000	2,446,000	2,554,000	
„ Orient ..	2,032,000	1,757,000	1,420,000	1,322,000	
„ Canada, etc. . .	253,000	267,000	309,000	294,000	
Total ..	5,965,000	6,282,000	5,325,000	5,314,000	
Stock, July 31 ..	1,904,000	1,662,000	1,848,000	2,206,000	
Total Distribution ..	7,869,000	7,944,000	7,173,000	7,520,000	

Note.—Stock figures include quantities afloat to and at ports and mills of geographical divisions stated.

AMERICAN COTTON CONSUMPTION

OCTOBER, 1938, WITH COMPARISONS

(Exclusive of linters)

Month	1913-14	1934-35	1935-36	1936-37	1937-38	1938-39	5-year average, 1933-34 to 1937-38 Bales	Per cent. this year is of 5-year average Per cent.
	Bales	Bales	Bales	Bales	Bales	Bales		
August ..	432,350	418,041	408,325	575,014	603,617	561,406	518,000	108.1
September ..	442,435	294,696	450,647	629,767	601,305	534,037	495,179	107.8
October ..	511,023	523,032	552,840	651,080	524,183	542,778	551,040	98.5
Total (3 mths.)	1,386,708	1,236,669	1,411,812	1,855,867	1,729,110	1,638,221	1,565,179	104.7
November ..	456,350	480,081	512,312	625,794	482,976	—	515,282	—
December ..	456,202	417,344	499,773	694,841	432,328	—	478,302	—
January ..	517,299	550,553	590,484	678,786	433,258	—	552,220	—
February ..	455,231	480,339	515,977	665,677	426,866	—	513,181	—
March ..	493,354	482,373	550,641	776,942	512,626	—	573,490	—
April ..	499,646	468,402	576,762	718,975	413,169	—	537,080	—
May ..	466,744	470,412	530,894	669,665	426,149	—	523,284	—
June ..	446,145	383,982	555,449	680,521	443,043	—	485,251	—
July ..	448,333	390,712	607,056	583,011	448,453	—	477,837	—
Total (12 mths)	5,626,078	5,360,867	6,351,160	7,950,079	5,747,978	—	6,222,066	—

Prices received by farmers for cotton lint averaged three-tenths of a cent higher in mid-October than a month earlier. The average of 8.5 cents per lb. on October 15 was four-tenths of a cent higher than a year ago. In many parts of the Cotton Belt, however, local market prices during the first half of October were lower than loan rates available to farmers.

GEOGRAPHICAL DIVISION OF EXPORTS OF AMERICAN COTTON

WEEK ENDING FRIDAY, DECEMBER 30, 1938

	Since August 1 This Year	Since August 1 Last Year
Great Britain	267,246	1,050,226
France	305,895	546,204
Germany	294,741	590,866
Holland	42,237	90,495
Belgium	57,671	115,529
Russia	—	—
Denmark	32,808	40,144
Norway	7,407	7,102
Sweden	51,454	56,361
Portugal	3,115	13,408
Spain	1,000	—
Poland	110,290	131,194
Italy	174,776	305,733
Japan	474,035	138,340
China	23,783	13,606
Manchukuo	906	7,722
British Columbia	8,224	7,321
Finland	9,646	11,300
India	1,596	79,789
South Africa	292	1,794
South America	5,567	7,665
Cuba	5,511	4,317
Latvia	1,361	460
Philippine Islands	970	97
Australia	4,705	6,251
Estonia	2,211	1,516
Canada	137,766	129,560
Jugoslavia	—	600
Czechoslovakia	300	—
Total (including Shipments to Canada)	2,025,513	3,357,600

CROP REPORTS

Messrs Weil Brothers, Montgomery, Alabama, in their Semi-monthly Crop Letter dated January 3, 1939, state as follows:—

Reports from various sources, including our correspondents, state that farm work such as ditching, terracing, clearing land and ploughing was negligible during December (as a usual thing there is considerable work of this nature being done in December) notwithstanding the weather in most localities was favourable for such operations. It is simply for the reason, as many farmers expressed themselves, that they are waiting and watching what the Government will do for them in 1939. That some constructive change in the Department of Agriculture's programme will come about is generally believed and new plans might even include larger acreage or larger direct payments or subsidies to induce consumption. Up to January 1, 1939, fertilizer sales are about the same as they were January 1, 1938.

During the last fortnight of the old year the usual holiday spirit prevailed. Nevertheless, demand from consumers or spinners, while sporadic, was good and it was principally filled out of stocks carried by cotton merchants which, by the

way, are greatly diminished ; it is prophesied, by those in position to forecast, that many spinners will find their qualities scarce and to some extent unobtainable. Likely four and a half million bales will finally go into the loan. Meanwhile, the country, or first hands, is offering very scantily—limited—and although the basis is high the price does not attract sellers.

Exports to date are about 41 per cent. less than last season, while the difference in domestic consumption is negligible. However, stocks of American cotton abroad are growing lower and we do not believe that exports will lose any more during the balance of the season. Furthermore, domestic spinners should be greatly benefited by retail sales during the past month and we may expect a better spring demand.

The *American Cotton Crop Service* of Madison, Florida, issue under date January 11, an interesting resumé of the outlook for the 1939 cotton crop from which we extract the following :—

The cotton crop outlook for the year 1939 appears to closely resemble that of last January. Soil moisture is, perhaps, not quite as abundant, with many areas in need of heavy precipitation for subsoil moisture storage. Open weather and mild temperatures for the past fortnight have stimulated activity in land preparation and late reports from the southern third of the Belt show preparation slightly ahead of usual. Farmers have accepted the depressed cotton price situation as due mainly to the huge surplus and will make no effort to exceed acreage allotments. It is believed by most of our crop reporters that cotton acreage will show no gain over that planted in 1938 with many doubting acreage being as large. Our advices indicate the total amount of fertilizer used per acre will be as high or higher than last year. One-variety communities are rapidly gaining in popularity and more seed with extra long staple will be planted. There is a rather widespread idea prevailing among farmers that present acreage allotments to cotton may become permanent and that they should plant their acreage allotments even where they do not wish to plant cotton at all. In the bright tobacco districts interest in cotton production is at a very low figure, as most growers will plant all the tobacco acreage they can harvest on account of the removal of acreage control. In the Florida Sea Island Belt a very heavy decrease in Sea Island acreage will be shown due to farmers doubling tobacco acreage.

The old system of cotton production has changed rapidly since 1933 and the Cotton Belt, now rapidly becoming an important manufacturing and livestock production centre, must be looked upon from a different viewpoint to understand the picture. The principal factors affecting cotton production may be listed as follows :—

1. Low-yielding submarginal lands are no longer planted to cotton.
2. Most of the poor tenant farmers—growers who, before 1933, planted large acreages of low-yielding land without the benefit of fertilizer, are now employed on Government Relief Projects or on the Rehabilitation programme which furnishes credit to purchase adequate livestock and fertilizer.
3. Large landowners are complying with the regulations of the Soil Conservation Programme and are either growing soil building crops or permitting their lands to grow weed crops.
4. Soil erosion is being rapidly checked by means of adequate terrace systems.
5. The lands planted to cotton are being better prepared with tractors doing a large part of the spring land-breaking.
6. Better varieties with longer staple lengths—many counties now plant only one variety—are being grown.
7. Government Production Credit Funds are available to both landlord and tenant or share-cropper.
8. County agricultural agents, on account of all farmers having to report for acreage allotments, are now master of the farmer's crop programme and better agricultural programmes are being carried out on each farm.

There are many other changes in the production of cotton which have come about since 1933. However, the changes listed are sufficient to show the trade that old statistics on U.S. cotton production are out of date and of little value in understanding the present Cotton Belt economic picture. Whether these changes in U.S. cotton production will be permanent ; whether production per acre will continue to increase through the adoption of the AAA Soil-building Programme ; whether the farmers' income will support him on the present living plane ; whether we will ever have a free cotton market again, etc., will be answered by the next generation.

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*The Minister of Agriculture of Egypt and the President of the International Cotton Federation
 are ex-officio members.*

General Secretary : N. S. PEARSE.

Hon. Secretary : JOHN POGSON, J.P.



EGYPTIAN COTTON

SECOND GOVERNMENT COTTON CROP ESTIMATE, 1938

After consideration of all available data received by the Ministry of Agriculture concerning the condition of the cotton crop at present, the Ministry issues its second estimate of the crop for the present year as follows :—

Variety	Seed Cotton		Ginned Cotton	
	Total Crs	Average Yield per Feddan Crs.	Total Crs.	Average Yield per Feddan Crs.
LONG STAPLE VARIETIES (Above 1½ in.)				
Maarad, Sakha 4, Sakel- laridis, Giza 7, Giza 26	2,461,000	2.94	2,540,000	3.03
AVERAGE STAPLE VARIETIES (Above 1½ in.)				
Giza 12, Fouadi ..	184,000	3.55	Giza 7	3.74
Giza 3, Various ..			193,000	
SHORT STAPLE VARIETIES (Above 1½ in.)				
Zagora, Ashmouni ..	3,999,000	4.48	4,467,000	5.00
TOTAL ..	6,644,000	3.72	7,200,000	4.04
Scarto ..	—	—	150,000	—
Total, including Scarto ..	6,644,000	3.72	7,350,000	4.04

EGYPTIAN GINNINGS TO DEC. 31, 1938

The following figures were published recently by the Ministry of Agriculture regarding the cotton ginned up to December 31, 1938, to which are added figures for the past two seasons :—

	1938/39 Crs.	1937/38 Crs.	1936/37 Crs.
Giza 7	1,162,539	2,237,471	2,080,776
Other Long Staple Varieties, 1½ in. ..	444,731		
Medium Staple Varieties, 1½ in. ..	138,231	105,954	100,314
Medium Staple Varieties, 1½ in. ..	3,317,011	4,092,868	4,471,424
Scarto	94,746	107,929	136,295
Total	5,157,258	6,544,222	6,788,809

NO EGYPTIAN GOVERNMENT INTERVENTION IN COTTON MARKET

The Egyptian Finance Minister declared emphatically at the Advisory Cotton Council's opening meeting on December 24 that the Government would not enter the market as a purchaser and that proposals to this effect would not be entertained.

It will be remembered that, following the incursion of the Egyptian Government in the cotton market in 1930, His Excellency the late Ahmed Abdel Wahab Pasha, in announcing the Government's plans for systematic disposal of its accumulated stocks before the Paris International Cotton Congress of 1931, stated definitely that the Egyptian Government would never again intervene in the cotton market.

LONG-STAPLED COTTONS

A recent article in the *Manchester Guardian* states that the new Giza 26 variety, of which over 8,000 feddans was cultivated this year, is claimed to be the best staple variety ever grown in Egypt, and most users of this class of cotton who have tested it appear to agree with this valuation. The higher grades of Giza 26 are competitive with the lower grades of Sea Island, so that the future development of this variety is a matter of great interest. The prices being paid for it at present will undoubtedly encourage growers to plant a larger acreage to it next year, probably at the expense of Sakellaridis. The question arises, however, as to whether the market will be able to absorb these increased quantities of the longest-stapled cottons, as the development of Giza 26 is taking place coincidentally with a revival of the growth of Sea Island in its original home—the coastal fringe of the United States. With Giza 26 giving the same yield as Sakellaridis—about 275 lb. to 300 lb. of lint per acre—the lower-yielding West Indian Sea Island cotton seems likely to be the loser.

COMBAT OF COTTON PESTS IN EGYPT

Earnest attempts are now being made by the Egyptian Ministry of Agriculture to bring the work of the Ministry into still closer touch with the farming community.

Recently leading farmers were asked to express their opinion on the best means of combating cotton pests which took such a heavy toll of the crop last year; 750 replies have now been received and these are being sifted and tabulated ready for the farmers' conference which the Ministry is organising, and will take place in January.

As the Minister of Agriculture stated in reply to a question in the Chamber of Deputies, the Ministry is continually in touch with scientific

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institutes in various parts of the world regarding the best means of combating the pests, but it is hoped that farmers may be able to suggest some practical measure which has so far eluded the scientist.

(*Egyptian Gazette*)

The Cairo Correspondent of the *Manchester Guardian* stated recently that the Egyptian Minister of Agriculture pointed out, in reply to a question from Ismail Sidky Pasha in the Chamber of Deputies, that the Ministry is in constant touch with scientific research institutes from London to Australia in connection with cotton pests and disease, and nothing more can be done in this direction. The Ministry, however, is now trying to find some practical rather than scientific methods of combating these enemies of cotton. Leading farmers were recently asked to make suggestions, and already something like sixty replies have been received. These are now being tabulated in order of practicability and cost, and early in the new year they will be submitted to a conference of five or six hundred farmers which the Ministry is organising in Cairo.

Steps are also being taken to revive the scheme for confining certain types of cotton to the most suitable districts. It has been found that farmers grow the type of cotton for which their land is best suited, although there is always the small exception of about 10 per cent. which the Ministry hopes to eliminate. Having decided which are the most favourable districts for Sakellaridis and Giza 26 as regards wilt, etc., the Ministry proposes, with the help of the agricultural banks, to distribute seed accordingly. It is believed that in this way they will not only increase production but, by the elimination of odd varieties in particular areas, reduce hybridisation. There will be no compulsion for farmers to adopt this plan, however, as it is believed that they will realise it is being done in their own interests and that sufficient control can be exercised through the distribution of seed. In this way it is hoped to foster the growth of Giza 26, of which high hopes are entertained, and Sakellaridis in particularly favourable districts in the Delta

Referring to the above comments on Government control of cotton seed in Egypt, a correspondent of the *Manchester Guardian* points out that the recent decision to exclude Nahda, Casulli, and Giza 3 from sowings and to include Giza 26 had no reference to the Seed Control Law of 1926, which has no control over varieties. The decision referred to the more recent Law No. 51, under which only varieties included in a certain schedule can be sown on more than ten feddans without Government permission. As regards the contracts against which the various new growths can be tendered, he says that Giza 12 is not tenderable against any contract either in Liverpool or Alexandria and that Giza 26 is in a similar position. Maarad and Sakha 4 are tenderable in Alexandria, but not in Liverpool. The wording of the new Giza 7 (No. 2) contract at Liverpool, he says, is ambiguous. The tenderable varieties are stated to be "Sakellaridis or Giza 7 grown in Egypt or Sakellaridis or similar

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varieties grown in the Sudan." It might be argued from this that Giza 26, for example, would be tenderable if grown in the Sudan but not if grown in Egypt, where the strain originated.

THE EGYPTIAN HUMIDITY AGREEMENT

By *Norman S. Pearse, General Secretary, International Federation of Master Cotton Spinners, & Manufacturers' Associations.*

Reprinted from the "Oldham Standard" Commercial Retrospect, 1938.

The question of moisture in Egyptian cotton has for many years past been regarded by the spinner of such cotton very much in the same light as the Bible regards the poor—as being "always with us." Steps have, however, been taken recently which show every promise of going far towards removing this source of annoyance once and for all.

On November 21 last there came into force a new agreement with regard to moisture in Egyptian cotton shipments. This agreement was approved by the International Cotton Committee at Milan on November 7 and reads as follows:—

"That this meeting of the International Cotton Committee hereby cancels the present Egyptian Humidity Agreement of 1931, as from November 21, 1938.

"That in place of such Agreement the Committee unanimously recommends all buyers of Egyptian cotton to purchase their supplies on the basis of dry weight plus $8\frac{1}{2}$ per cent. regain.

"That the weights and tests shall be certified by the Alexandria Testing House.

"That the expenses incurred by the Alexandria Testing House in regard to the moisture test and weighing of the shipment shall be met by the exporter of the cotton and included in the price of the cotton quoted to the buyer.

"That this recommendation shall operate for a period of twelve months commencing November 21, 1938."

HISTORY

Moisture in Egyptian cotton has been the subject of discussion between spinners and exporters since 1912, when the first Cotton Congress took place in Egypt.

The War intervened and it was not until 1931, after many discussions between Government officials, spinners and exporters that an agreement was arrived at.

According to that agreement the parties stipulated that the standard degree of humidity which cotton should contain is $8\frac{1}{2}$ per cent. regain, but a tolerance of 0.4 per cent. up or down from this standard regain was also decided upon.

In other words, any shipments where the humidity was above 8.9 per cent. regain, the excess above 8.9 per cent. had to be paid for by the

exporter to the buyer, whereas the buyer undertook to pay the difference to 8.1 per cent. if the shipment contained less than 8.1 per cent.

There was no allowance to be payable by either party if the moisture in the cotton was between 8.1 per cent. and 8.9 per cent.

The result of that agreement, in practice, was to make 8.9 per cent. the standard, as the majority of shippers managed to ship at 8.9 per cent. and over, with the consequence that the spinner was losing the tolerance of 0.4 per cent. on practically every shipment, a loss of .4 per cent. of his cotton bill.

Consequently, in 1936 the spinner members of the Joint Egyptian Cotton Committee put forward a proposal known as the Sils-Maria Resolution.

COUNTER RESOLUTION

This proposition made the suggestion that if 8.9 per cent. was exceeded, the shipper should pay for the excess moisture back to 8.5 per cent. Similarly, if there was excess fibre, i.e., less moisture than 8.1 per cent., the buyer would pay to the shipper up to 8.5 per cent. The resolution also stated that the cost of testing should be borne by the shipper if above 8.5 per cent. and by the buyer if below 8.5 per cent.

The Sils-Maria Resolution was placed before the Egyptian Cotton Congress early in 1938 but instead of discussing the Sils-Maria proposition the Egyptian delegates put forward a counter resolution submitting that the standard of moisture instead of being 8.5 per cent. should be 9 per cent. with a tolerance of .4 per cent. up or down.

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The spinners, however, rejected the proposition and at a meeting of the spinner members, which took place after the Congress, recommended all spinners affiliated to the International Cotton Federation to buy their Egyptian cotton under conditions "not less advantageous to themselves than those set out in the Sils-Maria Resolution."

During the evening of the last day of the Congress, the Egyptian members of the Joint Egyptian Cotton Committee approached the leaders of the International Federation asking that another meeting of the Joint Egyptian Cotton Committee should be held on the following morning to discuss the situation.

The meeting took place, and the exporters then undertook to study further the Sils-Maria proposition, while in the meantime the spinners adopted a resolution recommending members to continue the use of the old 1931 agreement until another meeting of the Joint Egyptian Cotton Committee could be held in July, 1938.

TESTING HOUSE

During the course of the Congress the spinner delegates viewed the Alexandria Testing House, where 27 testing ovens were in operation, and were able to see for themselves the high standard of efficiency attained by the organisation.

Upon their return home the spinners came to the conclusion that the best way of dealing with this subject of moisture in Egyptian cotton was to have the cotton tested at Alexandria and accept at the same time Alexandria shipping weights.

If the embarkation weight is taken at the same time as the moisture test, it is possible to establish once and for all the exact amount of correct-conditioned cotton in that shipment (i.e., absolute dry weight plus $8\frac{1}{2}$ per cent. moisture), no matter whether it gains or loses in transit to the mill.

With this idea in view, the spinners submitted that by far the simplest solution of this problem would be to buy Egyptian cotton on the basis of "bone-dry weight plus $8\frac{1}{2}$ per cent. of moisture and accept Alexandria weights and tests"; the suggestion was sent accordingly to the Egyptian members of the Joint Egyptian Cotton Committee prior to the Berlin meeting, which was held in July, 1938.

It is to be regretted, however, that the Egyptian delegates did not have sufficient time to study the question put forward by the spinners before the meeting, but during the Berlin meeting these were explained in more detail to the exporters' delegates, who undertook in their turn to submit the spinners' proposal and explanations to the exporters in Alexandria and report direct to the International Cotton Committee, which was to hold its meeting in the autumn of 1938.

Before this meeting took place a cable was received on September 20, 1938, from the secretary of the Egyptian Section, which stated that the exporters accepted in principle the proposal that cotton should be exported from Egypt and sold on the basis of dry weight plus $8\frac{1}{2}$ per cent. regain in conjunction with weights and tests being certified by the Alexandria Testing House.

CERTIFICATES GIVEN

The cablegram stated, however, that the Testing House could not test the whole of the crop this season and that only those spinners who applied for Alexandria tests would have this service rendered to them during the transitory period of one year.

Thus it transpires that every buyer of Egyptian cotton will be able to stipulate that his shipment shall be invoiced to him on the basis of $8\frac{1}{2}$ per cent. of moisture added to the dry weight of the shipment.

For those spinners who ask for this service the Alexandria Testing House will furnish to the seller of the cotton a certificate of weight and test for moisture and no other certificate shall be recognised. The cablegram also stated that there was good reason to believe that the proposition could be enforced legally for the season 1939-40.

The International Committee accordingly adopted the resolution quoted at the beginning of this article.

The Alexandria Testing House, therefore, will test any shipment of cotton if such a test is applied for by the buyer of the shipment. At the same time as the test is taken, representatives of the Testing House will also supervise the weighing of the whole shipment, and a certificate of test and weight will be issued by the Testing House both to the buyer and the seller.

The Testing House, in other words, establishes the amount of cotton at $8\frac{1}{2}$ per cent. moisture regain in each shipment, and this is done by obtaining the bone-dry weight, less tare and bagging and adding $8\frac{1}{2}$ per cent. to this bone-dry weight.

If the cotton is damp when shipped it will probably lose in weight but the spinner will only be invoiced the actual weight of the cotton as it should be if it were $8\frac{1}{2}$ per cent. or in correct condition. A dry shipment, on the other hand, say less than 8 per cent., may gain in weight during shipment. It may actually contain more than $8\frac{1}{2}$ per cent. of moisture when it arrives at the mill but the cotton will still be invoiced to the spinner on the basis of bone-dry weight plus $8\frac{1}{2}$ per cent. of moisture.

THE COST

The spinner may ask what will this new agreement cost?

The cost of testing by the Alexandria Testing House has been fixed by the trustees (who, by the way, include nominees of the spinners) at

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what may be considered a very reasonable figure. In the first instance 10 per cent. of the bales are sampled and tested, so that out of a shipment of 100 bales 10 bales are sampled. The cost in such a case would be no more than £1 17s. 0d. For a 33 bale shipment 4 bales will be sampled and tested and the cost for this is 90 piastres or 19s. 6d.

The Testing House have agreed to supervise the weighing of the whole shipment without any extra charge. At a cost of a little over half a point the spinner insures that he does not pay for excess moisture at the price of cotton.

There may be some difficulty and misunderstanding at first but if the question is studied closely it will be found to be the most equitable method of settling any differences in regard to excess moisture.

There are no calculations of tolerances to be added or deducted with the consequent query as to who should pay for the cost of the test.

There is also the important advantage that there now remains no incentive for the shipper to dampen his cotton.

He will realise that no matter how much water he puts into his cotton he will not receive payment for the same.

With drier cotton the quality should improve, for the Egyptian research specialists themselves have found out that as soon as cotton contains more than 11 per cent. of moisture, bacteriological fermentation begins to work inside the cotton, with the consequent weakening and deterioration of the fibre.

It has been established that cotton containing over 11 per cent. of moisture loses 12 per cent. in yarn strength and that the waste percentage increases by 2 per cent.

There are other advantages. If the shipper will cease watering his cotton, freight will not be paid on water. Furthermore, under the new system the shipping weight, as determined by the Alexandria Testing House, is final and there is therefore no longer any necessity for landing weights to be taken, thus avoiding countless claims for loss and gain in weight during shipment and resultant enormous clerical work by importers and shippers.

It is felt that all these advantages are advantages both to the spinner, the exporter and the Egyptian cultivator, and should create a gradually ever-increasing demand for Egyptian cotton.

THE COTTON WORM

Cotton circles are especially preoccupied by the appalling ravages of the cotton worm, which is believed to be this year as much as 20 per cent. of the total crop. Production in 1936/1937 amounted to about 10½ million kantars. Following the reduction of the cotton acreage, production this year should have declined by about one million. So far, however, the anticipated total is 7½ million kantars, which means that two million kantars have been devoured by parasites.

The Government's task is therefore clear. It must direct its attention to this truly national problem and study how to organise on a scientific basis the fight against these parasites. The national wealth is at stake.
(*La Bourse Egyptienne*)

FLUCTUATIONS IN EGYPTIAN COTTON PRICES

On December 15 the Egyptian Premier and Finance Minister received a deputation of leading farmers and, in response to complaints about the fall in cotton prices and to allegations that this had been caused by manipulation of the market, they promised immediate action against speculation pending the introduction of the necessary laws. This promise was followed by a stiffening of quotations for Sakellaridis at Alexandria, but by an extension of the fall in prices for Giza 7 and Ashmouni. Between December 15 and December 19 January, futures of Sakellaridis gained 12 points, but January futures of Giza 7 lost 32 points, and February futures of Ashmouni lost 22 points, weakness on the later date reflecting disappointment at the next step taken by the Government. There had been rumours towards the middle of the month that the Government would do several things to satisfy those interests which had been agitating for action to stop the decline in prices. It was suggested that, amongst other things, the export tax on cotton would be removed in order to stimulate sales abroad, and that the deposit of margins against short sales of futures would be made obligatory. All that the Government did, however, was to announce that it had decided to set up an advisory cotton council, with representatives of agricultural and cotton-trade interests along with officials. This was generally interpreted in the market as a sign that the Government did not contemplate any constructive measures, in the near future at any rate, but the effect was to make Giza 7 and Ashmouni futures regain all the ground that they had lost in the previous three sessions. The Advisory Cotton Council, at its inaugural meeting, decided to refer the question of the export tax to a sub-committee.

(*Manchester Guardian*)

The speech of H.M. King Farouk, of Egypt, on the occasion of the recent opening of the Egyptian Parliament, contained the following reference to the Egyptian Cotton Cloth Import Quotas :—

It should be pointed out that the Ministry of Finance has completed a scheme for regulating cotton piecegoods imports. This scheme, which does not involve the Government in any obligations, seeks to avoid harm to consumers, while at the same time safeguarding the national industry and encouraging cotton exports, on a basis guaranteeing equal treatment to all countries with which we do business in cotton and cotton goods.

THE ADVISORY COTTON COUNCIL

Commenting upon the formation of the Advisory Cotton Council, the *Egyptian Gazette* states as follows :—The formation of the Advisory Cotton Council is a timely move ; not because it portends the arrival of the millennium but because it offers a safeguard against rash action. In the first place, it should provide a forum in which any scheme for the betterment of the cotton trade as a whole can be debated, and the interests of all parties, rather than one particular section, can be considered. It will also, we hope, lead to a better understanding of the problems involved and remove the misapprehension among farmers that they are being exploited. The Bourse is an essential part of the trade ; it protects the farmer against sudden price fluctuations and without it he could not market his crops properly. Naturally, the heavy risks involved, of which the farmer is largely relieved, have their price, but regulations have been devised to prevent that excessive speculation of which agricultural interests so often complain. Therefore, if the Council leads to a better understanding between the various parties it will have accomplished something. But it can do much more. The farmers, we believe, could reap more benefit for themselves if they stopped tilting at the Bourse windmill and directed their attention to the land itself. The Cotton Research Board has done much valuable work (which is too often forgotten) in increasing the cotton yield and improving the general standard of the crop. Although, to the scientist, there is no such thing as finality, the Cotton Research Board cannot be expected, without some assistance, to go on indefinitely improving the yield at the same rate as past years. From time to time attention has been drawn by farmers in Parliament to the lack of proper land drainage, particularly in the Delta. They have said, in effect, that it is no good having an abundance of water (the outcome of new irrigation works) if the only result is a water-logged soil, especially when, as many believe, this weakens the plant's resistance to disease. It must be admitted that more attention is now being paid to this problem of land drainage than in years gone by, but still more could be done, and if only the farmers would direct their attention to this, instead of worrying their heads about price movements which they cannot hope to control, they would no doubt have their reward. In this connection we would commend to their notice, and to that of all interested in the subject, a report recently prepared by the National Economic Council for the President of the United States. The Council sent a Commission to study conditions in the thirteen cotton and tobacco states of the south and its report should be a warning to Egypt. Space precludes any detailed account of this report but the following figures will illustrate our point : " 22,000,000 acres of once fertile soil has been ruined (by erosion) beyond repair. Each year 27,500,000 tons of nitrogen and phosphorous compounds are leached out of the southern soil and sent down the rivers to the sea. The south loses £75,000,000 worth of topsoil through erosion every year." It might be well worth while for the Cotton Advisory Council to find out at an early date what Egypt loses through bad drainage.

GREECE REDUCES IMPORT TAX ON EGYPTIAN COTTON

According to the *Egyptian Gazette*, it is learned that the Greek Government, on representations from Egypt, has reduced the tax on cotton from five drachmae to two drachmae per lb. but the Egyptian Government is still not satisfied and is demanding the total abolition of the tax.

ALEXANDRIA COTTON MARKET'S MEASURES TO CHECK PRICE FALLS

The disorganisation of trading in cotton futures at Alexandria following the pronounced fall in quotations early this month has led to the committee of the Alexandria cotton market deciding to take various preventive measures as follows :—

- (1) Minimum prices were fixed on the 10th and the 13th instant.
- (2) The deposit of an original margin of \$2 per cantar against short sales of futures was made obligatory as was the case from 1931 to 1935. Only the members of the Bourse de Minet-el-Bassal being exempted from these payments.

The Government seems to be determined to prevent a further slump in the market, as the measures taken by the Bourse Commission show, but the fixing of minimum prices might become a serious handicap to the conclusion of normal export business, should the foreign markets continue to show a weak trend.

CROP AND MARKET REPORTS

Messrs. Reinhart & Co., of Alexandria, have forwarded the following report dated January 13, 1939 :—

The activity on the spot market has somewhat improved of late, although the market continues to be abnormally quiet. The sharp decline of futures prices has been ruinous for a large number of Interior merchants whose holdings have been sold out by the banks. On the other hand, those who are in a position to maintain the positions are reluctant in disposing of their stocks, being unable to replace the cotton up-country and trying to recover part of their losses. In consequence, premiums, especially of long staple varieties have a stiffening tendency. Practically the same premiums have to be paid today "on" March contracts as were asked for a few days ago "on" January delivery, and this in spite of the difference of from 30 to 50 points between the two options. Business up-country is rendered practically impossible by the decline on the futures market. The few cultivators who have not yet sold their cotton being unwilling to sell at present prices.

Total sales for the week amount to 9,451 bales, of which 3,304 bales Giza 7, 3,257 bales Ashmouni, 857 bales Sakellaridis, 822 bales Zagora, 748 bales Maarad, and 463 bales of other varieties.

The weekly report of the *Alexandria Commercial Co., S.A.*, dated January 13, contained the following :—

SPOT.—Our market this week was only open for five days and generally has shown signs of improved business. We estimate the week's turnover at about 11,000 bales, of which 4,100 bales Giza 7, 3,400 bales Ashmouni, 1,000 bales Zagora, and 2,500 bales other varieties.

GIZA 7.—The top grades continue to be much sought after and there was a good demand for the lower grades. Premiums were very firm.

ASHMOUNI.—Continued quiet with perhaps a little more interest for the medium grades. Premiums were unchanged.

ZAGORA.—Was very quiet at about last week's premiums.

OTHER VARIETIES.—Sakel, apart from the lower grades, was somewhat quieter but Maarad was in good demand and full premiums were paid. A little business was done in Giza 12 and Giza 26.

The official figures of Arrivals and Exports for the period of September 1, 1938, to January 4, 1939, are as follows :—

Arrivals : Sakellaridis Can. 126,697 ; Maarad Can. 242,106 ; Giza 7 Can. 1,128,367 ; Ashmouni and Zagora Can. 3,023,026 ; Fouadi Can. 16,403 ; Various Can. 174,854 ; Scarto Can. 8,560 ; Total Can. 4,720,013.

Exports : Sakellaridis Can. 141,182 ; Maarad Can. 142,806 ; Giza 7 Can. 610,657 ; Ashmouni and Zagora Can. 1,785,141 ; Fouadi Can. 11,940 ; Various Can. 106,559 ; Total Can. 2,798,285.

The week's receipts amount to Can. 163,718, against exports Can. 143,187. The stock in Alexandria stands at Can. 3,468,975, less Can. 164,446, consumed in Egypt.

The Egyptian Produce Trading Co. S.A.E. state as follows under date of January 19 :—

SPOT MARKET.—Following an inactive period, this market has distinguished itself by an extremely interesting amount of business, due both to purchases against sales abroad and to purchases for stocking purposes on account of the wide premiums prevailing in the futures market.

SAKEL has perhaps been, relatively speaking, the variety most in demand. The low ruling prices quoted for this variety have attracted the spinning industry's attention, and it looks as though the major part of those undesirable cottons mentioned in our previous Market Letters have found their natural and inevitable outlet. It is rumoured that the Egyptian Government is contemplating the withdrawal from the market of the certified cottons to which should be attributed the heaviness of the Sakel contract. If this measure were taken we think that a widening of the difference between Sakel and Giza 7 contracts is bound to take place.

MAARAD is in good demand with premiums firm, and a tendency to harden.

ASHMOUNI has had a regular offtake. High grades are fetching higher and higher prices. On the other hand, medium qualities are offered quite freely.

As to **ZAGORA**, although in our opinion a good portion of the crop has been sold, medium grades are selling at comparatively cheap prices with a tendency to ease further.

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SECOND COTTON FORECAST, 1938-39

This forecast is based upon reports furnished by the undermentioned provinces and States, which comprise the entire cotton area of India. The reports generally relate to sowings made up to October 1.

The total area so far reported this year is 21,492,000 acres, as compared with 20,731,000 acres (revised) at the corresponding time last year, or an increase of 4 per cent.

Weather conditions have not been quite favourable, and the present condition of the crop, on the whole, is reported to be fairly good.

The detailed figures for the provinces and States are given below :—

SECOND FORECAST : OCTOBER.

Provinces and States	Acres (Thousands)		
	1938-39	1937-38	1936-37
Bombay (a)	5,023	(b) 4,481	4,571
Central Provinces and Berar	3,925	3,989	4,093
Punjab (a)	3,734	3,772	3,490
Madras	833	657	757
United Provinces (a)	697	669	659
Sind (a)	973	1,012	927
Bengal (a)	87	(b) 94	(b) 93
Bihar	42	43	31
Assam	44	43	37
Ajmer-Merwara	22	(b) 25	21
North-West Frontier Province	21	21	17
Orissa	8	7	8
Delhi	1	1	2
Hyderabad	2,813	2,738	2,490
Central India	1,227	1,411	1,288
Baroda	861	648	856
Gwalior	641	560	608
Rajputana	476	(b) 526	518
Mysore	64	34	34
Total	21,492	(b) 20,731	(b) 20,500

(a) Including Indian States.

(b) Revised.

A statement showing the present estimates of area classified according to the recognised trade descriptions of cotton is given below :—

Descriptions of Cotton					Acres (Thousands)	
					1938-39	1937-38
Oomras—						
Khandesh .. .. .	..	..	..	..	1,338	1,325
Central India .. .. .	..	..	..	..	1,868	1,971
Barsi and Nagar .. .. .	..	..	..	..	1,922	2,029
Hyderabad-Gaorani .. .. .	..	..	..	..	882	841
Berar .. .. .	..	..	..	..	2,774	2,760
Central Provinces .. .. .	..	..	..	..	1,151	1,229
Total ..					9,935	10,155
Dholleras					1,748	(c) 1,931
Bengal-Sind—						
United Provinces .. .. .	..	..	..	..	697	669
Rajputana .. .. .	..	..	..	..	498	(c) 551
Sind-Punjab .. .. .	..	..	..	..	2,344	2,470
Others .. .. .	..	..	..	..	55	56
Total ..					3,594	(c) 3,746
American—						
Punjab .. .. .	..	..	..	..	1,765	1,703
Sind .. .. .	..	..	..	..	620	633
Total ..					2,385	2,336
Broach .. .. .	..	..	..	..	1,374	1,249
Coompta-Dharwars .. .. .	..	..	..	..	1,051	390
Westerns and Northern .. .. .	..	..	..	..	1,000	492
Cocanadas .. .. .	..	..	..	..	95	91
Tinnevellies .. .. .	..	..	..	..	175	202
Salems .. .. .	..	..	..	..
Cambodias .. .. .	..	..	..	..
Comillas and other sorts .. .. .	..	..	..	..	135	(c) 139
Grand Total ..					21,492	(c) 20,731

(c) Revised.

BURMAH.—The area sown with cotton in Burmah during the current year is now estimated at 516,000 acres, as compared with 563,000 acres, the actual area under the crop in 1937-38. The condition of the standing crop is reported to be generally fair.

SUMMARY OF THE THIRD COTTON FORECAST, 1938-39

			Thousand Acres	Thousand Bales	Remarks
All-India	..	..	23,049	4,797	Decrease : 5 per cent. in area and 13 per cent. in yield as compared with the corres- ponding forecast (revised) of last year.
Trade Descriptions :					
Oomras	..	..	9,954	1,639	
Bengal-Sind	..	..	3,461	919	
Dholleras	..	..	2,173	351	
Broach	..	..	1,421	386	
Americans	..	..	2,437	843	
Others	..	..	3,603	659	

COTTON EXPORTS FROM INDIA TO ALL DESTINATIONS

SEASON 1937-38 (from 1st September, 1937 till 31st August, 1938)

(In actual Bales.)

(Figures supplied by Messrs. VOLKART BROTHERS, WINTERTHUR)

Exporters	EUROPE					Dutch Ports	Belgian Ports	Sundry Ports	Total Europe	Japan (incl. Manchukuo)	China	U.S.A. etc.	Grand Total
	British Ports	German Ports	French Ports	Italian Ports	Spanish & Portuguese Ports								
Volkart Brothers	37,492	22,586	38,259	29,191	325	13,829	45,787	27,682	215,151	17,420	9,301	13,537	255,409
Kilachand Devchand & Co. Ltd.	26,475	26,956	9,442	28,160	—	2,255	10,993	8,328	112,609	44,004	490	6,250	163,353
Ralli Brothers Ltd.	56,182	18,907	3,935	13,329	1,805	3,706	16,252	8,946	123,062	19,734	—	11,362	154,178
Gosho Kabushiki Kaisha ..	125	880	2,484	2,327	—	—	1,430	674	7,920	128,523	9,250	—	145,693
Toyo Menka K. K.	3,812	570	—	—	—	—	—	440	110	4,932	123,313	700	137,583
Nippon Menkwa K. K. ..	360	2,931	4,476	2,449	—	605	2,488	1,650	14,959	109,012	7,496	—	131,467
Langley & Co.	22,932	1,210	450	564	55	1,045	1,634	87	27,977	79,368	4,000	2,500	113,845
Viram Latha & Co.	35,046	14,932	6,855	3,555	605	1,213	2,905	4,750	69,861	20,005	—	—	89,866
Bombay Co. Ltd.	3,312	18,192	4,036	5,819	55	9,230	22,297	3,470	66,411	600	—	16,254	83,265
Anderson Clayton & Co. ..	33,397	10,729	9,051	5,333	—	3,679	6,463	1,125	69,777	6,061	—	6,975	82,813
Kotak & Co.	5,617	943	55	110	50	110	220	358	7,463	70,042	900	—	78,405
Patel Cotton Co. Ltd. ..	19,976	8,078	13,305	9,407	220	1,760	8,205	1,965	62,916	5,250	350	—	68,516
Narsey Nagsey & Co. ..	—	2,385	550	675	—	55	1,953	—	5,618	48,490	500	—	54,608
Bhaidas Cursondas & Co. ..	14,471	3,708	6,699	717	—	1,485	26,303	585	53,968	—	—	—	51,740
Madhavdas Amarsey & Co. ..	—	—	—	—	—	—	—	—	—	50,540	1,200	—	49,793
Anandilal Podar & Co. ..	1,253	861	579	275	—	110	5,064	110	8,252	41,541	—	—	32,502
N. Rajahram & Co.	16,060	4,017	2,617	2,915	—	220	4,313	220	30,362	800	—	1,340	28,505
B. Mavji & Co. Ltd. ..	12,738	—	11,405	—	1,430	—	2,932	—	28,505	—	—	—	28,015
Gill & Co.	20,863	110	—	564	—	880	345	815	23,577	—	200	4,238	26,593
E. Spinner & Co.	6,466	8,340	1,923	6,503	—	1,632	879	850	26,593	—	—	—	22,793
Arjun Khimji & Co. ..	6,966	—	990	—	—	110	886	—	8,952	13,841	—	—	21,656
Shamji Karamshi & Co. ..	—	—	3,135	—	—	—	6,297	—	9,432	12,224	—	—	20,378
Lali Ramji & Co.	—	—	—	1,627	—	—	—	—	5,792	20,378	—	—	17,272
S. R. Tulshan & Co. ..	—	2,050	—	—	—	—	110	320	11,480	—	—	—	15,252
N. Fatehally & Co. ..	33,360	32,669	9,476	8,279	1,015	1,580	19,449	18,993	124,821	100,202	3,501	16,153	244,677
Sundry Shippers ..	—	—	—	—	—	—	—	—	—	—	—	—	—
Total	358,698	181,054	129,722	121,799	5,560	43,504	187,645	81,038	1,109,020	932,740	50,726	79,659	2,172,145

Total Exports for the Seasons 1936-37 and 1935-36 were 4,355,600 and 3,865,555 bales respectively.

The Indian Cotton Crop of 1936-37 Season classified according to Length of Staple

(These particulars, which are extracted from Statistical Bulletin No. 7 (1936-37), published by the Indian Central Cotton Committee in September, 1938, are based on the Provincial, State and All-India Cotton Forecasts and on information specially supplied by the Provincial and State Departments of Agriculture, and by firms who compile their own private estimates of the cotton crop.)

N.B.—The cottons marked "P" are pure strains evolved by Departments of Agriculture.

(Excludes Burmah.)

DESCRIPTION OF COTTON							Estimated Production According to Government (Official) forecasts
Staple Length 32nds in	Colour	Feel	Blow-room loss percentage	Spinning Capacity	In thousand bales of 400 lbs. each		
(The particulars given in these columns refer to observations and tests made in past seasons.)							
LONG STAPLE.—Over 1 in.							
(1) pPunjab-American—289.F.—(including K.T. types)	..	34	Bright, creamy white	..Soft, silky	..	9	30's warp or 40's weft
Total—Long Staple..	..						47
MEDIUM STAPLE, A—1 in.							
(2) pSind Sudhar (289. F.-1)	..	32	Creamy white	..Softish...	..	8	32's warp
(3) pSuri—Farm Cotton (1027. A.L.F.) (part)	..	32	White to creamy white	Soft	..	11	35's/40's warp
(4) pSurti—Farm Cotton (1027. A.L.F.) (part)	..	32	Very bright, white	Soft, silky	..	7-8	23's/30's warp
(5) pCambodia—Co. 2 (part)	..	32	Bright, slightly creamy	Good, soft	..	5-7	28's/30's warp
Total—1 in.						160
MEDIUM STAPLE, B—1 in. to 31/32 in.							
(6) pSurti—Farm Cotton (1027. A.L.F.) (part)	..	30 to 31	Very bright white	..Soft, silky	..	7-8	24's/28's warp
(7) pCambodia Co. 2 (part)	..	30	Bright, slightly creamy	Good, soft	..	5-7	24's/28's warp
(8) pJayawant	..	30	Creamy white	..Soft, bodied	..	12	26's/30's warp
(9) pUnjab-American L.S.S.	..	30	White, brightish	..Good	..	6-10	26's warp
(10) pWesterns Farm Cotton (Hagar—1)	..	28 to 30	Slightly creamy	..Soft, bodied	..	10-12	24's warp
(11) pKarungani—Farm Cotton (C-7, A-10 and KPT-1)	..	28 to 30	White to creamy white	Soft, bodied	..	6-8	24's warp
(12) pSing-American—4F-98	..	28 to 30	White	..Soft, silky	..	8	26's warp
(13) pB. D. 8 (pure)	..	28	White	..Good, smooth	..	5-6	30's warp
(14) pUpland-Farm Cotton (Gadag-1)	..	28	Creamy white	..Good-bodied	..	7-8	24's/30's warp
(15) Hyderabad Gaoran	..	28	Creamy white	..Good, soft	..	9-13	24's warp
(16) pC. P. and Berar Verum	..	28	White	..Soft, good-bodied	..	9	20's/24's warp
(17) Surti ordinary	..	28	Creamy	..Soft, or slightly rough	..	6-7	20's/24's warp
(18) Cambodia, other than items (5) and (7)	..	28	Bright, slightly creamy	Good-bodied	..	5-7	22's/26's warp
(19) Kumpia-Dharwar, other than items (8) and (14)	..	28	Yellow-tinted	..Soft, bodied	..	14-16	22's warp
(20) Northerns	..	28	Creamy white	..Soft, soft	..	8	22's warp
(21) Tinnevelly, other than item No. (11)	..	24 to 28	Whitish-creamy	..Full-bodied	..	6-8	16's warp, 20's weft
(22) pPunjab-American—4.F.	..	24 to 28	White	..Good-bodied	..	8-10	20's warp
(23) pSind-American—4.F., other than item No. (12)...	..	24 to 28	White	..Soft, silky	..	8-10	20's warp
Total—1 in. to 31/32 in.						1,897
Total—Medium Staple						2,057

SHORT STAPLE, A—11/16-in. to 27/32-in.									
(24) Salems	..	26 to 27	White to creamy white	..	6-8	14's/20's warp	..	35	
(25) Dharwar Upland— <i>zilevati</i> (other than Gadag-1)	..	24	Creamy white	..	9-10	18's warp or 20's weft	..	11	
(26) Central India Malvi and Nimari	..	22 to 26	White	..	10-12	14's/20's warp	..	307	
(27) Madras Westerns (other than Hagari-1)	..	22 to 26	Creamy	..	11-13	16's warp	..	189	
(28) C.P. No. 1 Oomras	..	20 to 24	Creamy white	..	7-8	13's/16's warp	..	123	
(29) Dholeras—Wagad	..	24 to 27	Bluish white	..	12-15	14's/18's warp	..	217	
(30) Hyderabad Kumpia-Dharwar	..	20 to 26	Creamy white	..	14-16	14's/18's warp	..	2	
(31) Bijapur and Bagalkot Jowar	..	20 to 26	Creamy white	..	11-13	14's/18's warp	..	20	
(32) Broach-Kanvi	..	20 to 24	Very white	..	7-9	14's/18's warp	..	150	
(33) Banilla	..	20 to 24	White	..	11-14	12's/16's warp	..	35	
(34) Coconades and Warangal	..	20 to 26	White to dark brown	..	—	14's warp	..	25	
(35) Bengals—N.W.F.P.	..	20 to 24	Creamy white	..	—	12's/14's warp	..	4	
Total—11/16-in. to 27/32-in.									
SHORT STAPLE, B—18/32-in. to 21/32-in.									
(36) C.P. No. 2 Oomras	..	16 to 22	Good white	..	..	10's/12's warp	..	612
(37) C. P. No. 3 Oomras	..	16 to 18	White	..	10	6's/8's warp	..	103	
(38) Hyderabad Westerns	..	20	Creamy white	..	11-13	12's/14's warp	..	36	
(39) Khandesh Oomras	..	18	White to creamy white	..	9-11	10's/12's reeling†	..	245	
(40) Barri and Nagar Oomras	..	18	Creamy white	..	9-11	10's/12's reeling	..	19	
(41) Hyderabad Oomras	..	18	Creamy white	..	9-11	10's/12's reeling	..	319	
(42) Dholeras—Mattheo	..	16 to 20	Creamy	..	15	10's/12's reeling	..	219	
Total—18/32-in. to 21/32-in.									
SHORT STAPLE, C—17/32-in. and below;									
(43) Bengals—Bighelkhand and Bundelkhand	..	12 to 20	Good white	..	9-10	8's/10's reeling	..	2	
(44) Bengals—United Provinces	..	12 to 20	Good white	..	9-11	8's/10's reeling	..	176	
(45) Bengals—Sajpura	..	12 to 20	Good white	..	9-11	8's/10's reeling	..	85	
(46) Bengals—Sind (dun)	..	12 to 18	Whitest	..	8-10	8's/10's reeling	..	225	
(47) Bengals—Punjab (dun)	..	16 to 18	Good white	..	9-11	8's/10's reeling	..	1,021†	
(48) Bengals—Bihar and Orissa	..	12 to 16	White	..	—	8's/10's reeling	..	7	
(49) Bengals—Western Bengal	..	12 to 16	White	..	—	12's reeling	..	2	
(50) Comillas	..	12 to 16	White or Khaki coloured	..	—	8's/10's reeling	..	39	
(51) Others	..	..	..	..	—	..	..	2
Total—17/32-in. and below									
Total—Short Staple									
GRAND TOTAL									
								1,659	
								4,100	
								6,204‡	

Includes N.T., L.S.S., and others.

† Reeling is yarn spun for the Indian handloom industry.

‡ Includes 345,000 bales of Mollisoni.

§ Adding the tentative estimate of 4,500,000 bales for the annual domestic consumption of cotton in India, the total estimated production during the current season comes to 7,147,000 bales, according to private estimates as against 6,204,000 bales according to official estimates.

CROP REPORTS

Messrs. Volkart Brothers, Winterthur, Switzerland, report as follows under date of December 8, 1938 :—

Below follows our most recent crop estimate for the season 1938-39 as well as a provisional guess of its expected consumption :

	1938/39	1938/39	1937/38
	7.12.38	8.9.38	Final
Sind & Punjab Desi	790,000	960,000	1,115,000
Punjab American & Sind American..	1,390,000	1,465,000	1,315,000
Un. Prov. & Rajputana	315,000	375,000	360,000
Omras	1,514,000	1,819,000	1,816,000
Broach & Surtis	510,000	450,000	514,000
Dhollera & Muttia	356,000	391,000	501,000
Comptah/Dharwar	175,000	156,000	149,000
Coconada & Warrangal	40,000	40,000	38,000
Bombay & Madras West. & Northern	303,000	318,000	190,000
Tinnevely & Cambodia	270,000	360,000	377,000
Calcutta	40,000	45,000	47,000
TOTAL CROP	5,703,000	6,360,000	6,422,000
Domestic Consumption	750,000	750,000	750,000
Carryover from old season	1,700,000	1,700,000	1,118,000
TOTAL SUPPLY	8,153,000	8,819,000	8,290,000
Exports to Europe, etc.	1,400,000		1,190,000
Exports to Japan	1,100,000		932,000
Exports to China	150,000		50,000
Indian Mill Takings	2,800,000		3,668,000
Domestic Consumption	750,000		750,000
TOTAL OFFTAKE	6,200,000		6,590,000
Carryover to new season	1,953,000		1,700,000

The reduction of the estimate as compared with the figures in our report of October 7, is chiefly explained by the very unfavourable development of the Omras, where the excessive rains during the summer months have had a more deteriorating effect than even the worst pessimist anticipated. The Punjab crops had in store another disappointment and finally we now receive catastrophic reports from the Cambodia tracts.

To foresee the probable takings is perhaps even more difficult than it was a year ago. We issued the comparative figures of previous seasons in our last report of October 7. We feel we can count upon an increased consumption from Europe as against last year because the competition of short staple Americans is less in evidence and because there existed a favourable parity for Indian cotton, virtually since the start of the season. Japan is the great enigma. The takings of Indian cotton have dwindled down to 1,000,000 bales consequent to a scarcity of foreign exchange. However, the comparatively large stocks existing at the beginning of the war, have simultaneously been used up. If Japan succeeds in keeping her export trade on the present level, cotton imports will again have to assume larger proportions, and since the supply of cotton from Northern China appears to meet with some difficulty, a slight increase of Indian takings is probable. Our estimate must in any case be considered as a minimum. The Chinese mills as well, will use a fair amount of Indian cotton. It is surprising how quickly the industry has recovered from tremendous damages inflicted by the war, but as the traffic from the inland to the cotton centres is still considerably hampered, we expect it will have to resort to foreign cotton to a large measure.

The Indian local consumption reached 3,000,000 bales last year. The mills have bought about 600,000 bales in excess of their consumption. Even if last

year's consumption figure should again be reached—a doubtful factor in the face of the reduced buying power of the Indian population, at the same time not out of the question in view of the increased export possibilities—they can live partly on last year's stocks, with the effect that the takings may remain well below the actual consumption. It is not customary, however, to take refuge to the stocks, unless market prices are higher than the actual cost. But this is not so in this particular case.

Our estimate of the distribution is therefore highly provisional only and uncertain and statistical reflections based thereon have no claim on absolute reliability.

Messrs. Ralli Brothers Limited published the following on December 12, 1938 :—

INDIAN COTTON ESTIMATES (in Thousands)

Season : September-August. (Bales of 392 lbs. net.)

	1938-1939	1937-38	1936-37	1935-36
Crop Movement in India	Prev. 31/10/38	Present	Final	Final
Oomras	2,220	2,170	2,201	2,478
Bengal/Sind	1,333	1,232	1,515	1,387
American Surats	1,608	1,490	1,350	1,724
Broach/Surti	647	647	672	700
Dholerah	519	519	494	479
Comptah Dharwar	191	200	182	225
Western/Northern Dekkan Carnats	317	320	259	310
Coconada	40	40	38	41
Tinnivelly/Cambodia	539	539	512	475
Comilla styles	64	64	57	49
Burmah, etc.	140	140	130	121
Receipts (Net yield, plus previous undistributed surplus)	7,618	7,361	7,410	7,989
Handspindles and Mills' Loose Takings	750	750	750	750
	8,368	8,111	8,160	8,739*
Supplies in India :				
Less previous season's undistributed surplus	1,421	1,421*	946	966
Yield (gross) : Our estimate	6,947	6,690	7,214	7,773*
Government's (with Burmah)	?	?	5,789	6,325
Acreage : Our estimate including Burmah	26,750	26,750*	26,083	25,219
Distribution of above supplies :				
Europe, etc.	1,250	1,150	1,220	1,831
Japan	850	950	935	2,567
China, etc.	150	150	125	80
Indian Mills	3,000	3,000	3,709	2,565
Indian Mills loose takings	500	500	500	467
Handspindles, etc.	250	250	250	283
Total Takings	6,000	6,000	6,739	7,793*
Undistributed Surplus	2,368	2,111*	1,421	946
World Position of Indian Cotton.				
Supplies :—				
Opening Stocks, including Mills' and Transit—				
India	2,950	2,950*	1,800	1,550
Abroad	1,050	1,050	1,800	1,650
Yield, as above	6,950	6,700	7,200	7,750
Total Gross Supplies	10,950	10,700	10,800	10,950*

* High Records.

Consumptions :—

Europe, etc.	1,400	1,300	1,400	1,700	1,700
Japan, China, etc.	1,000	1,100	1,550	2,400*	1,800
Cotton Mills—Indian Mills	3,400	3,250	3,500*	2,850	2,750
Indian Handspindles, etc.	250	250	250	300	350
Sundry consumptions and losses	100	100	100	100	100

Total Consumption	6,150	6,000	6,800	7,350*	6,700
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Surplus—Gross	4,800	4,700*	4,000	3,600	3,200
vs Total Consumption	78.0%	78.3%*	59.9%	49.0%	47.8%

American Cotton :—

Gross Supplies	25,800	25,750	24,685	19,375	19,540
Consumption	11,000	11,000	10,935	13,140	12,575
Surplus, gross	14,800	14,750*	13,750	6,235	6,965
„ vs Consumption	134.6%	134.1%*	125.7%	47.5%	55.4%

All Cotton (American Bale Basis) :—

Gross Supplies	52,800	52,700*	50,800	44,590	41,115
Total Consumption	26,150	26,050	27,050	31,290*	28,045
Surplus, gross	26,650	26,650*	23,750	13,300	13,070
„ vs Consumption	101.8%	102.1%*	87.8%	42.5%	46.6%

Mid. Spot in Liverpool, Season's

averages	5.22d.†	4.98d.†	4.97d.	7.11d.	6.52d.
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* High Records.

† Actual quotations October 29 and 10 inst.

On the information now before us, this season's Statistical Position of American, Indian and Other Growths, compared with that of last season and with averages of the previous five seasons, appears about as follows :—

	THOUSANDS BALES OF 478 LBS. NETT, BUT RUNNING BALES FOR AMERICAN.							
	1937/1938				1938/1939			
	American	Indian	Others	TOTALS	American	Indian	Others	TOTALS
Carryover	6,235	2,910	4,155	13,300	13,750	3,200	6,800	23,750
Production	18,450	5,550	13,300	37,300	12,000	5,150	11,600	28,750
Supplies	24,685	8,460	17,455	50,600	25,750	8,350	18,400	52,500
Consumption	10,935	5,260	10,655	26,850	11,000	4,600	10,250	25,850
Surplus	13,750	3,200	6,800	23,750	14,750	3,750	8,150	26,650
And its percentage on Consumption	125.7%	60.9%	63.8%	88.5%	134.1%	81.5%	79.5%	103.1%

Averages of Five Seasons—1933/1934 and 1937/1938 :

Production	12,723	5,185	11,052	28,960
Supplies	21,680	7,620	14,385	43,685
Consumption	12,405	4,945	10,175	27,525
SURPLUS and its Percentage on Consumption	9,275	2,675	4,210	16,160
	74.8%	54.1%	41.4%	58.7%

The above figures are exclusive of the takings by Indian Handspindles. Consumptions include sundry losses, etc.

It will be noticed that our estimates of the Indian Production are reduced by about 250,000 Indian bales ; but, as the consumption will probably be less than was expected, the estimated actual surplus is only slightly reduced and remains still at a record high figure.

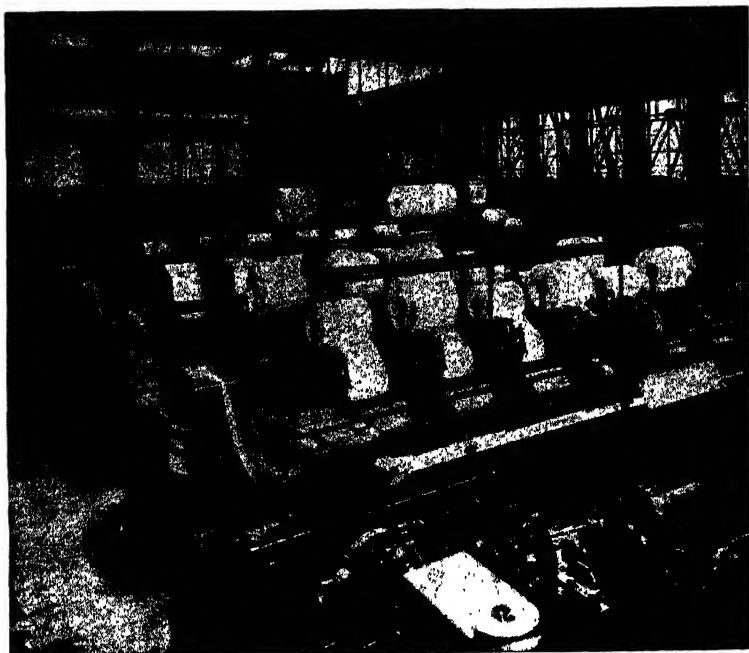
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The illustration above shows an Installation of new Model Nasmith Combing Machines in a Lancashire Mill.

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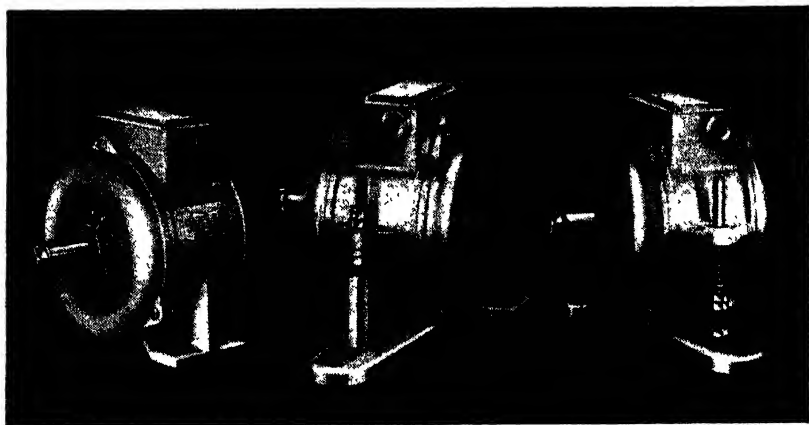
The machine when running is almost silent compared with the original. It is also easier for the operative to manipulate, and has simpler, more accessible and quicker adjustment. The machine has many other merits that will well repay close investigation.

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FURTHER TESTS ON THE COMBING OF GOOD QUALITY INDIAN COTTONS

(By Dr. Nazir Ahmad, Director, Indian Central Cotton Committee Technological Laboratory, Bombay. Published in the Indian Central Cotton Committee Technological Bulletin, Series A, No. 44, price 1 rupee.)

This bulletin contains the results of the combing tests carried out on four good quality Indian cottons, P.A.289F, Jayawant, Surat 1027 A.L.F. and Cambodia Co.2 with a view to studying the effects of light combing on their fibre properties and spinning performance. Each cotton was spun into carded yarns and was also combed, on a Nasmyth Comber, with 8's, 10's and 12's nipper settings and the combed material was spun on the same ring frame into suitable counts. The comber waste obtained from each cotton with each nipper setting was mixed in the proportion of 1 : 2 with Broach (Palej) cotton and the mixtures were spun into suitable coarse counts. The resulting yarns were examined forlea-breaking strength, single thread strength, evenness class, number of neps per yard, etc. The raw cottons, the carded and the combed slivers and the comber wastes were subjected to fibre tests for the determination of mean fibre-length and fibre-length irregularity. The following conclusions are drawn from a consideration of the results obtained in these experiments.

(1) The mean fibre-length of the combed material is greater than that of the carded material and the difference between the two increases progressively as the degree of combing is raised resulting in the extraction of larger percentages of comber waste. However, in no case the mean length of the combed material exceeded that of the raw cotton even when, with 12's nipper setting, 20-25 per cent. comber waste was extracted. This agrees very well with a previous result of the Laboratory.

(2) The fibre-length irregularity decreases, or, in other words, the regularity of the fibres in respect of length improves as the degree of combing is raised. This effect is most noticeable with P.A.289F.

(3) The mean fibre-length of the comber wastes is much lower than that of either the raw material or the carded sliver. It shows a tendency to increase with the extraction of the higher percentages of comber waste. With a few exceptions, the fibre-length irregularity of the comber waste

is about 25 per cent. and is independent either of the nipper setting employed or the cotton used in the tests.

(4) By combing these cottons to the extent of only 8 per cent. it is possible to spin them without many breakages into finer counts, the difference in this respect (yarn breakages) between the materials combed to the extent of 8 and 12 per cent. respectively from the same cotton is not significant, but by employing a still higher degree of combing (25 per cent.) it is possible to spin the material into still finer counts and yet avoid bad spinning troubles.

The comber wastes when mixed with Broach (Palej) presented no difficulty in spinning on the ring frame in the matter of yarn breakages.

(5) Combing has the desirable effect of reducing the degree of neppiness of yarns, especially where this defect exists, to an appreciable extent, in the raw material; there is very little difference in this respect in the relative efficiency of 8 per cent. and 12 per cent. combing, while combing to the extent of 20-25 per cent. with 12's nipper setting does bring about a further improvement.

(6) Degree of neppiness of yarns spun from the mixtures of comber wastes does not bear a simple relationship to the neppiness of the original good quality cotton. Furthermore, the degree of neppiness in the yarns spun from the mixture of comber wastes of these four cottons with Broach (Palej) cotton appears to be independent of the nipper setting from 8's to 12's setting.

(7) There is no appreciable difference in the degree of evenness of the yarns obtained with 8 per cent. and 12 per cent. combing, but there is a marked improvement in evenness when with 12's nipper setting, 20 to 25 per cent. comber waste is extracted. Thus, in order to spin "even" 40's yarns or "fairly even" 60's yarns from these cottons it would be necessary to extract at least 20-25 per cent. waste in the combing process, any lower degree of combing failing to bring about a substantial improvement over the carded yarns in respect of evenness of yarns.

(8) With these four cottons a small improvement (about 5 per cent.) in yarn strength over the carded yarns may be achieved by extracting about 8 per cent. comber waste with 8's nipper setting. If still further improvement in yarn strength is aimed at, it can only be effected by extracting 20-25 per cent. comber waste, the intermediate stage failing to produce any appreciable increase in yarn strength. The improvement observed in yarn strength, etc., with 8's nipper setting should be regarded as being mainly due to the better orientation and parallelisation of fibres, while the improvement noticed with the higher nipper settings is partly due to these factors and partly to an improvement in mean fibre-length and fibre-length regularity brought about by the extraction of the shorter fibres in relatively larger proportions. As the total improvement in yarn strength with 12's setting was of the order of 18 per cent. the difference between the two gives a rough estimate of the relative importance of the two sets of factors. In order, however, to obtain more exact values, it would be necessary to undertake more tests of a similar nature. The values

A Necessary Evil?

We are not for a moment suggesting that our winding is bad, in fact the reverse is true, but there has long been a thought in the Industry that winding was a necessary evil. However, just as adversity strengthens a man so winding improves the yarn during the process. A cleaner and stronger yarn is produced and in a form which is eminently suitable for the next process it has to undergo.



UNIVERSAL WINDING COMPANY
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given above are the averages for the different cottons, which, however, show interesting differential response to the combing treatment.

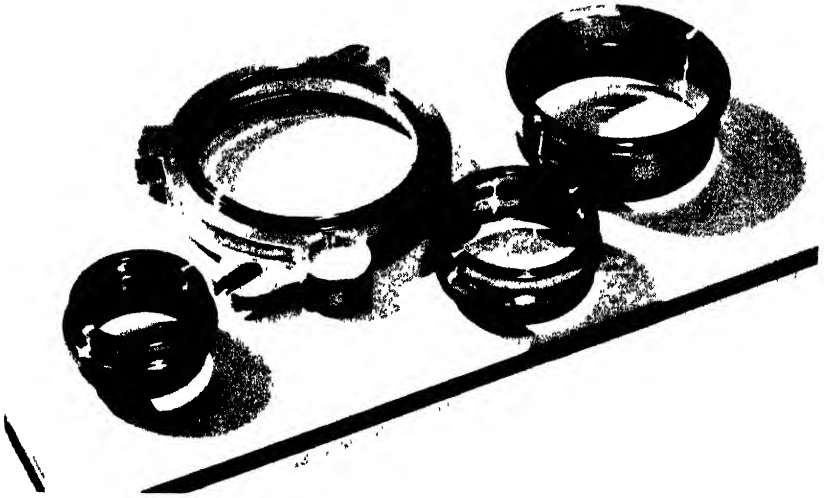
(9) While the comber wastes of Jayawant and Surat 1027 A.L.F. when mixed with Broach (Palej) improved the spinning performance of the latter, that of Cambodia Co.2 lowered it slightly, while the comber wastes of P.A.289F obtained with the different nipper settings behaved in an erratic manner due probably to the presence of immature fibres in the wastes obtained from this cotton.

THE BEARINGS OF SPINDLES

A small book publication by Vereinigte Kugellager-fabriken A.G., Stuttgart, is much more than a catalogue description of SKF-Norma roller-bearing spindles, roller-bearing tape-drive tension pulleys and top rollers for drafting, and other special ball or roller bearing applications to textile machines such as openers, scutchers, cards, condensers, and mules. Besides these it includes much excellent technical matter and data on the evolution of spindle bearings, the dynamics of spindles, and practical advice. The details of the roller-bearing spindle have been greatly improved since they were introduced sixteen years ago, the refinements being based on theoretical calculation and experiment and practical experience. If a spindle is to give long, satisfactory service, its design and dimensions must be thoroughly adapted to the conditions of its work. The roller-bearing ring spindles differ from plain bearing spindles chiefly in the bearing insert which, according to the work, is fitted in the bolster in three ways, *i.e.*, cylindrical, spherical or conical, the last being rigid. The fit makes the spindle a flexible one, a spring being fitted which also prevents rotation but allows the bearing insert to follow the dynamic axis of spindle and load. In the foot of the bolster is a damping sleeve which also follows the oscillatory movement, but damps it by frictional resistance, diminishing the sensitiveness. For silk and rayon up-twisters, the spindle may have a rigid bearing insert. When speeds of rotation are high or loads are likely to be out of balance, instead of a damping sleeve there is a brake-ring on the bearing insert itself, and this has a great capacity for damping vibration.

The book describes methods of testing power consumed; the saving in power is 12 per cent. to 30 per cent. The life of the spindle is claimed to be no shorter than that of a plain bearing spindle, and one of the roller-bearing inserts outlasts several plain bearing inner tubes. With roller bearings the clearance between bearing and spindle remains at the minimum.

One of the advantages of an accurate roller bearing is the possibility of using a thick blade, which is thus less inclined to vibrate and less easily bent than a thin one. In plain bearings, however, a thick blade would use



ADVICE ON RINGS

- 1 Buy from a reputable maker
- 2 Run them in with discretion
- 3 Keep them free from dirt & rust
- 4 Avoid too heavy or too light
a traveller.

excessive power. The roller-bearing spindles require very little oil which, for that reason, can be of the highest quality. It is indeed a mistake to over-lubricate, not only because of the waste of oil and possibility of oil-stained yarn, but also an actual increase in power consumption.

Spindle rails should be level and clean before putting in the bolster. A thin hard paper washer under the bolster flange on ground spindle rails will hold the bolster secure without undue tightening of the screw which might result in fractures of the bolster. When spindles are cleaned care should be taken not to lose or damage the collar springs of brake-ring insert spindles. Collar springs need never be changed, but worn or damaged flat springs of standard spindles need to be replaced. Worn or broken springs cause unsteady running and give rise to "collar rust."

For true rotation and minimum stress the yarn load should be as low on the spindle as possible. The best running is obtained when the tubes or bobbins are held on the blade as near as possible to the upper extremity and there is some play between the lower extremity of the bobbin or tube and the wharve boss, allowing the yarn package to accommodate itself to the gravity axis, giving self-centring during fast running. Very thin paper tubes might be in contact with the blade throughout their length. The radial clearance, however, should not exceed a certain amount up to 0.016 in. for the heavier based bobbins.

Pirn clips or wooden cones should not be hammered on with the blade in position as the footstep bearing might be damaged unless the blade is lifted up with a pair of pliers. The safest way is to take the blade out and rest the step point on lead.

Bobbins and tubes should be made with the help of a special gauge, not a sample spindle, the gauges being marked to show the allowable highest and lowest positions of the tube. Bobbins and tubes should be as accurate and free from eccentricity as possible. Spinners now check new and worn bobbins for lack of balance. Two spindles can be used, one carrying a bobbin whose lack of balance is just permissible, the bobbins for testing being put on the other. Alternatively, the bobbins can be tested on a rigid spindle which more readily gives vibration. Bad bobbins mean thread breakages, increased waste, lower limits of speed, that is, lower output, increased wear of spindles and increased power consumption.

The booklet includes an interesting exposition of rotation on a free axis, the gyroscopic principle stresses, vibration and its damping, all as bearing on the practical requirements of rigid or flexible spindles.

The requirements in respect to tension pulleys for tape drive are dealt with in the same thorough way, covering such matters as dimensions of tapes, tape joints, tape slip, effect of fly, etc. Ball bearing top rollers have the advantages of keeping the loose bosses in accurate position and not requiring lubricating.

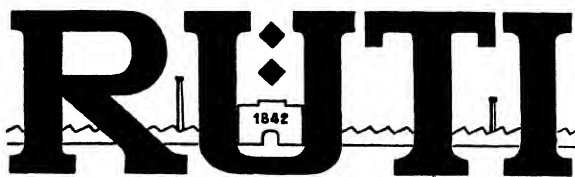
The matters mentioned above are dealt with quite fully in the booklet which is a most excellent study of this subject.

(Textile Manufacturer)

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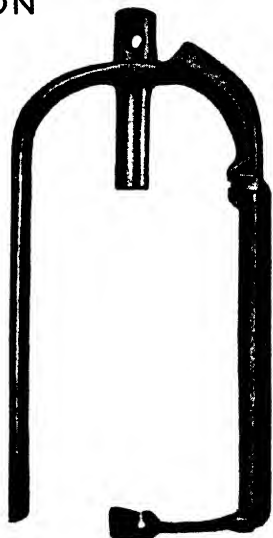
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REDUCING WASTE IN THE WEAVING SHED

The following extract is taken from an article on the above subject, specially contributed to the *Textile Weekly*, of Manchester :—

WEFT WASTE

The making of excessive weft waste is an all too frequent occurrence in the weaving shed and can be the source of much trouble and financial loss. The causes which result in excessive weft waste are, of course, numerous but they can be grouped for convenience under three headings, namely, (1) unsatisfactory “shuttling” of the weft cops by the weaver; (2) faulty weft or badly wound cops; (3) defective shuttles or faulty operation of the loom.

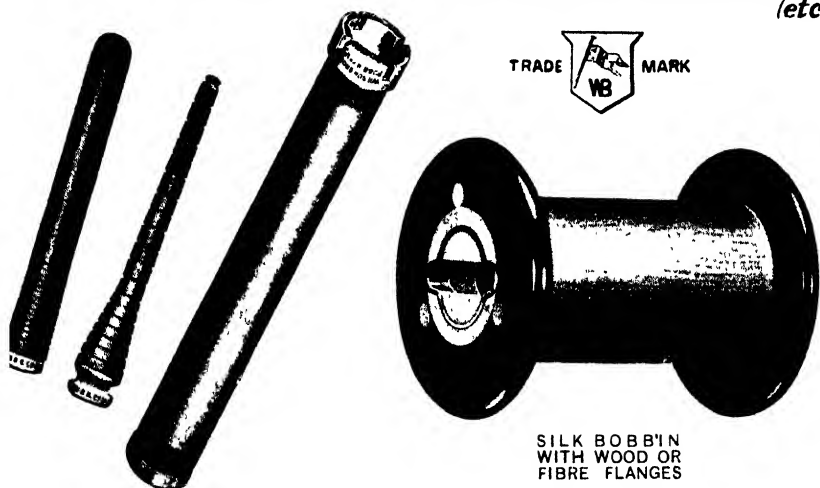
When ordinary weft cops are used, the skewering or “shuttling” of the cops forms an important item in the duties of the weaver and must be carried out carefully and efficiently if excessive waste is to be prevented. The cop should be placed on the shuttle tongue in such a manner that the latter does not “stab” the cop or pierce the coils of weft which form the central hole of the cop for the reception of the tongue. As few of the initial coils of weft as practicable should be taken from the cop before the weft is threaded through the shuttle eye. The withdrawal of the first few coils by the weaver is often necessary to ensure a free unwinding of the yarn from the shuttle, but the common practice of taking from the cops many more than the initial coils should not be allowed as it is a common cause of excessive waste. Care should also be taken to see that each cop bottom (which is the portion of weft remaining on the shuttle tongue when the shuttle is taken from the loom) is as small as practicable, as these form a large part of the weft waste, particularly when they are left bigger than necessary.

It is a good plan to see that all learners in the weaving shed are taught by a competent person the correct method of “shuttling” cops, for even some experienced weavers are by no means proficient in this respect. If all weavers were systematically taught the best way to skewer cops, then much excessive waste caused by the cops being stabbed, the cops slipping or breaking on the tongue, pulling off too many coils from the cop nose, etc., would be avoided.

FAULTY COPS

An immense amount of weft wastage can be caused by badly wound cops and bobbins. Softly built-up cops are particularly troublesome as they tend to break and slip along the tongue during weaving. If the cops are too short in the chase then the tendency will be for the coils near the chase to slip away from the remainder of the package owing to the steep angle of the chase. This will be brought about by the normal stresses and shocks of picking and checking unless the yarn is very tightly wound. Care should also be taken to see that the cops are not too long for the shuttle tongue or otherwise unsuitable. Where wooden bobbins or paper tubes are used, the yarn sometimes becomes loose from the bobbin,

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particularly if the packages have been allowed to get dry after winding. Proper humidification is therefore beneficial in reducing the amount of waste.

All weft should be carefully handled during its transit and distribution, as well as in the weaving shed, for rough handling is a frequent cause of broken and misshapen cops, and consequently excessive waste. It is advisable to instruct weavers to place all defective weft packages at one side so that they can be examined and the defects pointed out to the persons or firm responsible. Where such a method is adopted, defective packages can often be replaced, or rewound on a braiding machine into cord, instead of being thrown out as waste.

LOOM DEFECTS WHICH CAUSE EXCESSIVE WASTE

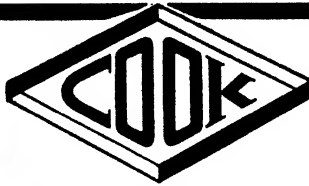
If weft waste is to be minimised, the shuttles, the picking motion, and the shuttle-checking arrangement, must be kept in good condition. The shuttle tongue or peg should be of the appropriate length and thickness to conform to the cops or bobbins used, and properly positioned in the shuttle. The pressure exerted by the tongue-spring on the cop should be sufficient to retain the cop in position under normal weaving conditions. The tongue should be kept perfectly smooth and should not be bent or misshapen in any way. Small adjustments in the thickness of the tongue and the pressure of the tongue spring are often necessary in order to prevent the cops from slipping off the tongue, thus reducing the amount of weft waste. Such adjustments can be effected by inserting thin packings of cardboard or ordinary pitch band between the spring and the main portion of the tongue. Care should also be taken to see that there is sufficient "drag" on the weft as it passes from the tongue to the shuttle eye and that "ballooning" of the weft is prevented. Unwinding of the weft will thus be facilitated, and wastage due to weft breakages and consequent loom stoppages will be prevented.

Weft "sloughing" away from the nose of the cop or bobbin and cops flying off the shuttle tongue are frequent causes of excessive weft waste. This "sloughing" and flying-off is often solely or partially due to the sudden or severe impact of the shuttle against the picker, brought about by too strong a picking action or unsuitable checking of the shuttle. As the tendency is for the coils of weft to slide forward in the direction in which the shuttle is travelling immediately prior to the impact, they are most liable to slide off the tongue when the tip of the latter is at the leading end of the shuttle, which is usually when the shuttle is moving away from the starting side of the loom. Thus a too powerful picking action at the starting side of the loom or bad checking at the off-side of the loom frequently cause "sloughing" and flying off of the cops. A smooth picking action with just sufficient impetus to send the shuttle across the sley in the time available, together with a smooth and gradual checking of the shuttle as it enters the shuttle box, should therefore be aimed at in order to prevent "sloughing" of the weft and minimise wastage due to this cause.

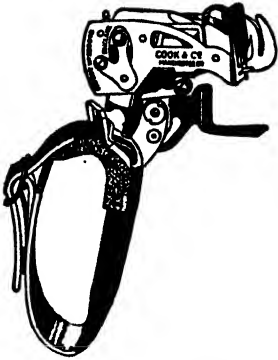
WARP WASTE

In many weaving sheds little or no attention is paid to the question of warp waste and weavers are allowed to throw surplus yarn on to the

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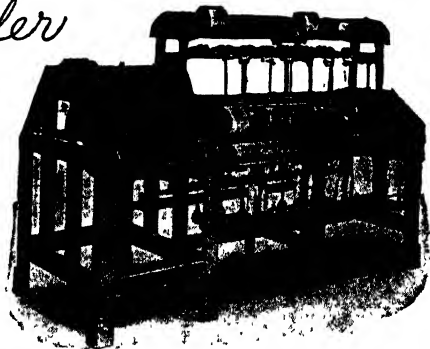
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alley floor, where it becomes dirty and is passed down with the sweepings. Any yarn which the weaver cannot use should be kept clean and separate from other counts or kinds of material. It can then, from time to time, be taken to the weft cellar or other convenient place, and subsequently either re-used as remnant yarn or placed with similar waste yarn and sold to a waste dealer. In the latter case, the material can be sold as clean waste of a homogeneous nature and thus fetch a much higher price than in the form of dirty waste or floor "sweepings." A saving in warp yarn can often be effected by weaving out *completely* all satisfactory warps, thus adding an extra yard or so of cloth to the length of the last piece. Very often the surplus warp at the end of the beam is cut away and thrown into the sweepings. If there is a short surplus length of warp at the beginning of a beam, this should also be woven into cloth and delivered into the warehouse with the first "cut." Such pieces can be sold as fents. The "headings" to "cuts" are often made unduly long by the weaver, thus causing a waste of warp and weft, while the fringes of warp which are sometimes required at the ends of pieces are frequently made too long. Another fairly common practice is to make a fringe of warp between two "cuts" where this is not required, the fringe being subsequently cut away as waste. This is done by the weaver in order to reduce the length of the woven pieces and by shortening the weaving time per piece, gain an unfair financial benefit.

SWEEPINGS

The sweepings from the floor of the weaving shed should contain as little textile material as possible and under no circumstances should it comprise a considerable percentage of warp and weft waste, as is so often the case. Weavers should be told that *all* waste must be placed in receptacles and not on the floor. It should not be necessary for any manufacturer to pay someone to examine sweepings in order to retrieve valuable yarn waste. It may, however, be advisable to give the sweepings a cursory inspection in order to regain such items as small tools, bobbins, bolts, washers, pieces of reed, etc., which often find their way on to the floor and which would otherwise go out of the mill by way of the sweepings.

WASTE USED FOR CLEANING PURPOSES

In many mills, ordinary weft waste is used for cleaning the looms, and this subsequently finds its way, in a dirty and oily condition, into the floor sweepings. In the opinion of the writer, the practice of using waste for cleaning purposes should not be allowed. In the first place, its use is neither as efficient nor as economical as the use of brushes or the standard cloths which are now sold for wiping purposes with arrangements for their washing, repairing and replacement in a regular manner. Pieces of waste are liable to get entangled in the warp during cleaning and cause yarn breakages or damage to the cloth. Secondly, the use of weft waste tends to result in the weavers greatly underestimating its value and consequently using it indiscriminately and making it with complete indifference. Thirdly, the presence of oily waste either lying on the floor or packed in bags is a fire hazard which should not be tolerated.

SACO-LOWELL MODEL J ROVING FRAME

Messrs. Saco-Lowell, of Boston, Mass., have recently placed on the market a new controlled draft roving frame known as Model J.

This roving frame has been built with a drafting element containing the essentials for producing a high degree of fibre control while operating on a range of drafts which practice and experience have shown to be very practical and satisfactory under ordinary prevailing conditions in the average card room.

The ratio of four on the slubber, five on the intermediate, and six on the fine frames has been the accepted rule for drafts on roving frames for half a century. These could be extended some if extra long cotton was used, but years of trial and trouble had proved the old rule about right. How, then, is it possible to run drafts of fifteen to fifty on one-process roving frames? Many mill men have asked this question. Here is the answer.

One-process roving requires less draft than ordinary multi-process roving. For example, in making a five-hank carded roving from $\cdot 167$ hank sliver the total weight reduction is 5 divided by $\cdot 167 = 30$. If three processes of roving are used, this must be multiplied by two for the two ends in the intermediate and again by two for the fine frame, *i.e.*, $30 \times 2 \times 2 = 120$ total draft for three-process conventional roving. On the other hand, the one-process roving frame, because it does not have to add doubling to compensate for errors in winding, twisting, creeling, piercing, and handling, requires but a single end and one-fourth the draft, namely 30. At first glance, this 30 draft may seem excessive for one machine, but an analysis of the drafting element shows that the long draft roving frame is really a two-roll slubber followed by a two-roll intermediate or fine frame, both using single roving. This is accomplished in the Model J roving frame as a result of the following very definite and accepted rules of drafting.

The Model J frame has four lines of rolls with the drafting divided into two zones: the back zone, drafting between the third and back roll, corresponds to a slubber; the front zone, drafting between front and second, to an intermediate.

Every drafting operation tends to fan out the fibres and make ragged selvages resulting in loose fly, loss of fibre, and licking of rolls.

The longer the draft the more the fan action. Therefore, after every major draft it is necessary to condense the selvages. This is accomplished in the usual process by twist, but twist is not put in uniformly because there is more in the thin places than the thick, and when the roving is next drafted the fibres do not feed evenly as they would if they were held without twist—hence, Rule No. 3: After every major draft reform and condense the roving without twist.

In the Model J between the second and third rolls is a reforming zone where the fibres which have been spread out fan-shaped by the drafting

in the slubber zone are reformed into a compact mass without the introduction of twist.

This method of reforming and condensing without twist permits the slubber roving to again be drafted without a break draft and, with rolls set as close or closer together as on a standard intermediate, at normal intermediate speeds, for the roving is much more open and in better condition to draft than is the usual two-process system. Hence, Rule No. 4: Two pairs of rolls for the intermediate.

Combining the slubber and intermediate frame into one frame also gives the slubber element a distinct advantage from the speed viewpoint, because the speed of the third roll, which corresponds to the front roll of the ordinary slubber, is only one-quarter to one-sixth that of the slubber. This permits the fibre to be drawn out of the heavy bulk more evenly, and this in turn allows longer drafts than usual in a slubber. For example, the catalogue spindle speeds of an 8×4 making 3.00 hank is 1,000 r.p.m., or the 136 r.p.m. of front roll. With a draft of five in the intermediate section the speed of the third roll is only 27 r.p.m., whereas a slubber making the same hank as the third roll does—namely .60—would have a catalogue speed of 223—hence, Rule No. 5: Regular speeds for the intermediate zone; slow speed for the slubber zone.

It will be seen from the above that the Controlled Draft Roving Frame is a two-roll slubber plus a two-roll intermediate, each of them operating under optimum conditions of speed and drafting. Therefore, Rule No. 6 can be safely established: Drafts of four to seven in the slubber and, because of open untwisted roving, normal drafting—*i.e.*, five to seven—in the intermediate.

To summarize, the Model J roving frame is built according to six standard rules of drafting practice, and simply combines a slubber and intermediate into one frame. The drafts are the usual drafts and the speeds normal or less, and no untried theory or practice is involved.

(Saco Lowell Bulletin)

HEAT-RESISTANT COTTON TYRE CORDS

Discussing the development of Heat-Resistant tyre cords and the characteristics of such cords Mr. Wm. D. Anderson, president Bibb Mfg. Co., at a convention of the National Association of Independent Tyre Dealers, held October 12, in New Orleans. Mr. Anderson stated that it was while his company was experimenting with low-stretch, low-gauge, and high-density cord, that the heat-resistant principle was discovered. The most startling characteristic of Heat-Resistant cord is that when reduced to the bone-dry state, it has approximately 92 per cent. of the tensile strength it had when it contained the normal moisture content of $6\frac{1}{2}$ to 7 per cent. The superior lasting quality of the cord is due to the fact that under the high temperature conditions encountered by heavy-duty tyres, the Heat-Resistant cords deteriorate more slowly than is the case with ordinary tyre cord.

Wm. D. Anderson said in conclusion, "I predict that no other fibre will ever successfully replace cotton in an automobile tyre. No known fibre combines the remarkable tensile strength of cotton with its flexibility, its resiliency, and its ability to stand punishment."

(U.S. Textile World)

KNITTING ATTACHMENT FOR LOOMS

Recent reports of the development of a new attachment to be applied to looms to permit production of combination woven-knitted fabrics have aroused much interest in United States trade circles. This device—which was invented by Warren P. Griffiths, and is to be manufactured by Fidelity Machine Co., Philadelphia—is designed to put a knitted face on a woven fabric. One advantage of such fabrics is that they have the appearance of knit goods without the tendency toward excessive stretching. It is stated that it will be at least four or five months before the attachment is available commercially.

(U.S. Textile World)

TECHNOLOGICAL REPORTS ON STANDARD INDIAN COTTONS, 1938

(Published by the Technological Laboratory of the Indian Central Cotton Committee, Bombay. Price 1 Rupee, 8 Annas.)

The term "Standard Indian Cottons" is applied to certain improved varieties of cotton which are steadily replacing the older varieties in different parts of India, and which, at present, cover over 17 per cent. of the total area under cotton cultivation. It is the practice at the Technological Laboratory to subject these cottons of each season to a very thorough test for their fibre properties and yarn characteristics. This Bulletin contains the detailed results of these tests on standard cottons of 1937-38 season, together with the results for the previous seasons. The methods and technique of fibre, yarn and spinning tests employed at the Technological Laboratory are described in the Technological Bulletins, Series A, No. 25 and Series B, No. 20, the latter bulletin dealing with the technique of maturity tests which were commenced in 1934-35.



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HOURS OF WORK IN FRANCE

The French Government recently introduced a Legislative Decree (from which the following is extracted) dealing with hours of work in French industry :—

MAINTENANCE OF THE PRINCIPLE OF THE FORTY-HOUR WEEK

The statutory limit of hours of work for all undertakings in France remains at forty a week. Owing, however, to the gravity of the economic situation, the methods of applying the forty-hour week as laid down by the Decrees at present in force will, for a period of three years, be amended in certain respects. These amendments are given below.

CALCULATION OF HOURS OF WORK

The Act of June 21, 1936 limits hours of actual work, but does not define "work." The Legislative Decree stipulates that hours of actual work must exclude the time necessary for changing clothes and for snacks, and also periods of inaction in industrial and commercial undertakings which will be specified by a Decree. The periods in question may be included in paid time, however, if it is the usual custom or the collective labour agreements so provide.

As an exception to the above rule, hours of presence in underground mines will be deemed to be hours of actual work.

DISTRIBUTION OF HOURS OF WORK

A week of six working days will in the future be considered the normal basis for weekly hours of work in France.

Heads of undertakings may therefore choose between two methods of distributing hours of work : (1) an equal distribution over the six weekdays ; (2) an unequal distribution over the weekdays, with a view to establishing one half-holiday a week.

The method of distributing hours over five days a week will only be allowed in future in occupations or classes of occupations and in undertakings for which it is authorised by an Order of the Ministry of Labour and, where necessary, of the Minister concerned.

The labour inspector may authorise undertakings or classes of undertakings to employ a method of unequal distribution over the weekdays, other than that indicated above.

The Decrees in force allowed hours of work to be distributed over five days with a holiday on Saturday or Monday, or an equal or unequal distribution over six days. In practice the method of distributing hours

of work over five days was more frequently adopted. The Minister of Labour made the following statement on this point :—

By prescribing a week of six working days as the basis for weekly hours of work in France, the Government is not intending to force all the industrial and commercial undertakings in the country, without discrimination, to work six days running.

In order to appreciate the real effort made in certain branches of industry by both employers and workers to increase output, while distributing weekly hours of work over five days, and the satisfactory results obtained, the Minister of Labour is empowered, after agreement, if necessary, with the Minister concerned, to allow industrial or commercial undertakings an exemption from the principle laid down in the Decree, by which they may continue to work eight hours a day for five days a week.

The Minister of Labour considers that the elastic procedure thus laid down will allow each occupation to reconcile its usual practice with the imperious needs of economic recovery.

MAKING UP TIME LOST DURING HOLIDAYS WITH PAY

The Decree contains a new provision which lays down that holidays with pay in excess of the fifteen days prescribed by the legislation concerning holidays with pay may be made up without pay.

OVERTIME

The Legislative Decree amends the rules for overtime in cases of exceptional pressure of business on the three following points :—

(1) It simplifies the procedure for the use of such overtime by substituting for the previous system of permits a more elastic system, combining, as the preamble to the Decree states, " the system of permits with that of the advance notice to be given by the employer to the labour inspector."

(2) Whereas the regulations at present in force fixed an annual allowance for overtime, the Legislative Decree fixes no such *a priori* limits. The allowance in question was usually 75 hours—or in certain cases 90 or 100 hours—for industrial undertakings, and varied from 25 to 150 hours for commercial establishments and offices. In addition to this, exceptional allowances for overtime were granted by the Decrees of December 21, 1937, for industries on which a considerable part of the total French production depends (50 hours) and those suffering from a shortage of skilled labour (75 hours). Another Decree, of August 30, 1938, added a further 100 hours to the annual allowance of overtime.

(3) The Decree makes substantial reductions in rates of pay for overtime. Formerly the increase over normal rates might not be less than 25 per cent. or any higher rate established by the collective agreements or customary practice.

Under the new regulations, heads of undertakings are allowed to order overtime to be worked to meet an increase of business, up to a maximum of fifty hours, simply by giving notice in advance to the labour inspector. They may also send the labour inspector a registered letter requesting a renewal of the permit in question for further stretches of overtime of forty

hours each. The renewal is taken as granted if it has not been refused within ten days of the dispatch of the registered letter. The labour inspector may require reasons to be given for the use of overtime.

If the inspector refuses to renew the permit, he must immediately advise the Minister of Labour. The permit is taken as granted if the decision to refuse it has not been confirmed within one month after the ten days mentioned above by a decision of the Minister of Labour, taken in agreement with the Minister of Commerce or other competent Minister.

If the Minister of Commerce or other competent Minister after being consulted by the Minister of Labour, does not reply within eight days to the Minister's proposal, he is considered to have given his consent to the decision to refuse the permit. The permit given by the Minister of Labour may grant only part of the overtime applied for.

Permits for overtime may be withdrawn at any moment by an Order signed by the Minister of Labour and the Minister of Commerce or other competent Minister, especially in cases where it is economically and technically possible to avoid overtime by increasing the staff, or rearranging the work, or by some other method of labour organisation.

If a permit is withdrawn, the head of the undertaking can no longer require overtime to meet pressure of business unless he obtains a special permit from the labour inspector.

If extra hours beyond the overtime allowed by such a permit are necessary, for carrying out an order, the head of the undertaking may, if he supplies the necessary reasons, apply for permission to work the necessary overtime, up to a maximum of twenty-four hours. The procedure for allowing this is the same as that mentioned above.

An ordinary Decree will lay down special provisions for mines, but the provisions in question will not come into force for coal mines till after the expiry of the national agreement of September 1, 1938.

Overtime worked to meet exceptional pressure of business must not result in increasing daily hours beyond 9 or weekly hours beyond 48, except in cases where the regulations in force allow a higher limit, or where a special permit has been obtained from the labour inspector. The increase

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in wages payable for the first 250 hours' overtime worked in one year, in undertakings employing more than 50 persons, is 10 per cent., notwithstanding any contrary provisions in labour agreements; for other undertakings, the increase may not be less than 5 nor more than 10 per cent.

The increase must not exceed 15 per cent. up to 400 hours' overtime, in any undertaking; for any overtime worked in excess of 400 hours the increase is fixed at 25 per cent.

OTHER PROVISIONS

The Legislative Decree contains a number of other provisions, as follows:—

A special contribution will be levied on the increased profits due to overtime made by undertakings which are subject to the tax on industrial and commercial profits. The basis of this contribution will be calculated by adding to the net amount which is taken into account for assessing the tax on industrial and commercial profits—excluding any deficit carried over from the previous year—the estimated proportion of hours of overtime to the total number of hours worked by the staff during the period which is considered for the purposes of the tax in question. The rate of the contribution is fixed at 10 per cent.

The Decree lays down that the effect of a collective agreement must not be to lessen the output of an undertaking, and therefore any clauses in a contract which prohibit piece-rate wages and bonuses for output, or restrict the use or modernising of plant, or limit overtime to certain processes will be considered null and void. Further, the Minister of Labour may, after consulting the occupational organisations concerned, and without regard to the provisions of any collective labour agreements, authorise the work of an undertaking to be organised in relays or in rotation.

The provisions of the Decree will be applicable notwithstanding any clauses to the contrary in laws, regulations or contracts. The Decrees which determine the methods of application of the Forty-Hour Week Act may be amended by an ordinary Decree up to December 31, 1938.

The provisions with regard to distributing hours of work over the days of the week are applicable to Government departments, public services, State and municipal industrial services, and concessionary services. The provisions with regard to hours of work in all these services must be revised and amended before January 1, 1939: this will be done by means of a Decree signed by the competent Minister, the Minister of Labour and the Minister of Finance.

The provisions of the Legislative Decree must not in any case result in a reduction of overtime or an increase in overtime rates of pay beyond the limits prescribed by the provisions at present in force.

(International Labour Review)

ARGENTINE TEXTILE INDUSTRY

Most of the Argentine textile mills have been operating on a part-time basis for the past few months, according to a recent U.S. commerce report. This situation was attributed by the local trade to heavy imports

of foreign textiles. Under date of July 28, the Chamber of Deputies asked the Government to investigate the matter, and the results of the survey were submitted through the Ministry of Agriculture on September 30. The report on the local textile conditions admits that there have recently been heavy imports of certain items but intimates that a more basic cause of the present difficulties is over-expansion by the domestic textile industry.

The Argentine textile industry received a considerable stimulus during the World War, and its growth was facilitated by the local production of wool and cotton. Tariff protection also encouraged the rapid expansion of local textile manufacture to a point where it is now one of the most important industries in the country. In 1935 the industrial census showed 4,712 textile establishments with an invested capital of 334,116,000 pesos compared with 1,743 establishments with a capital of 34,423,000 pesos in 1914; the number of employees was about 88,625 in 1935, against 13,450 in 1914. The Argentine textile industry is now said to supply 85 per cent. of the total domestic demand for wool goods, 40 per cent. for cotton goods, and practically the entire requirements for hosiery and other knit goods and silk and rayon manufactures, according to the official report.

NEW WEAVING MACHINERY FOR EGYPT

We understand that the Société Misr. de Filature et de Tissage Fin en Coton Egyptien is busily erecting a new mill at Kafrel Dawar. When completed, in about a year's time, the mill will have over a thousand automatic looms. A large proportion of these looms will be fitted with the latest fool-proof jacquard machines for pattern weaving. The machinery will be of British manufacture.

THE BRITISH COTTON INDUSTRY ENABLING BILL

The Joint Committee of British Cotton Trade Organisations has circulated to all firms in the industry forms on which they are invited to declare their support of the proposed Cotton Industry Enabling Bill. Any firm which does not declare its positive approval will be regarded as being opposed to the Bill.

A covering letter stresses that if the Bill is to be effective within the next twelve months, it must be introduced within the next few weeks.

A statement issued by the Joint Committee of Cotton Trade Organisations recently about the progress of the Cotton Industry Enabling Bill said that a large number of firms have already sent in signed forms supporting the proposals, either to their trade organisation or to the accountant appointed to check forms.

EARNINGS IN THE COTTON INDUSTRY IN THE UNITED STATES

The following is extracted from the January, 1939, issue of the *British Ministry of Labour Gazette* :—

A report recently issued by the United States Bureau of Labour Statistics summarises the results of investigations into the earnings of wage-earners employed in the cotton goods industry of the United States of America in April, 1937, and August, 1938.

EARNINGS IN APRIL, 1937

In the investigation relating to April, 1937, particulars were extracted from the pay-rolls of a representative selection of 244 undertakings employing 91,970 workpeople, or about one-fifth of the total number of workers engaged in the industry at that date. In the Northern States, the hourly earnings of workpeople in these undertakings averaged 52·1 cents for males, 44·5 cents for females, and 48·9 cents for all wage-earners; in the Southern States, they averaged 39·6 cents for males, 35·2 cents for females, and 38·1 cents for all wage-earners. The following table shows the average hourly earnings in some of the principal occupations at April, 1937 :—

Occupation	Northern States		Southern States	
	Number of workers	Average hourly earnings	Number of workers	Average hourly earnings
<i>Male Workers</i>				
Card grinders	117	57·1	438	48·7
Card tenders and strippers	484	46·3	1,840	35·2
Drawing-frame tenders	176	43·3	990	37·0
Slubber tenders	238	53·9	1,204	41·0
Speeder tenders	360	49·8	2,899	40·7
Twister tenders	159	54·6	988	36·2
Roving men	355	40·2	1,346	33·3
Doffers	669	49·9	4,082	38·6
Loom fixers	947	77·3	2,337	57·0
Second hands	305	71·7	953	57·9
Section hands	408	56·0	1,430	48·6
Slasher tenders	168	65·7	518	44·7
Weavers	2,264	56·0	4,371	45·3
Sweepers and scrubbers	438	37·5	1,909	27·5
Oilers	343	41·0	1,102	34·6
Truckers, general	419	41·3	1,452	34·7
<i>Female Workers</i>				
Drawing-frame tenders	185	41·0	180	33·6
Speeder tenders	1,061	47·5	734	39·3
Frame spinners	1,883	45·7	8,833	35·3
Trimmers and inspectors	736	39·2	1,074	34·9
Creelers	118	40·3	304	34·8
Weavers	1,529	51·1	2,269	43·1
Filling and battery hands	569	39·0	1,878	34·0
Machinery cleaners	429	37·8	412	30·5

In April, 1937, wages were at a relatively high level, which was maintained during the later months of that year. During the spring and summer of 1938, however, there was a gradual decline, more especially in the Northern States, and in August, 1938, the general level of average hourly earnings was considerably lower than in April, 1937.

EARNINGS IN AUGUST, 1938

In August, 1938, particulars of weekly earnings and of man-hours worked were obtained from 784 establishments, employing 319,000 workpeople, or about 89 per cent. of the total numbers then engaged in the industry. Of the 784 establishments covered, 200 were in the North, employing 69,000 workers, and 584 were in the South, employing 250,000 workers. The average hourly earnings in the Northern States were 44·58 cents, the average weekly number of man-hours worked being 37·1; in the Southern States, the average hourly earnings were 36·54 cents, the average weekly man-hours being 35·2.

Figures are given in the report showing the distribution of individual hourly earnings, at August, 1938, of 89,000 wage-earners employed at 237 of the 244 representative undertakings for which particulars of occupational earnings at April, 1937, are given in the table above (the remaining seven undertakings having closed down between these two dates). The average hourly earnings of the workpeople employed in these 237 establishments were 36·9 cents, as compared with 38·3 cents in the 784 establishments from which returns of total earnings and total man-hours worked were obtained. The percentage proportions of workpeople, in these 237 undertakings, whose hourly earnings, at August, 1938, fell within certain specified limits, were as shown below :—

Proportions of wage-earners whose average hourly earnings were within the ranges specified in the previous column.

Range of average hourly earnings			Northern States		Southern States.		Northern and Southern States.	
<i>Cents</i>			Males	Females	Males	Females	Males	Females
			%	%	%	%	%	%
Under 22·5	..	..	0·1	0·7	5·4	8·6	4·2	6·2
22·5 and under 35·0	..	..	18·9	30·1	47·2	61·0	40·6	52·4
35·0 " "	47·5	..	42·7	57·1	33·4	28·1	35·5	36·3
47·5 " "	67·5	..	29·7	12·0	13·5	2·3	17·2	5·1
67·5 " "	92·5	..	8·2	0·1	0·5	0·0	2·4	0·0
92·5 and over	..	..	0·4	..	0·0	..	0·1	..
Total	..	..	100·0	100·0	100·0	100·0	100·0	100·0

THE UKRAINIAN TEXTILE INDUSTRY

In Tsarist Russia the textile industry was distributed very irrationally, 94·5 per cent. of all the spindles and looms in the country being concentrated in the enterprises of the three central areas of Moscow, Ivanovo and Leningrad, none of which grew the raw materials.

Since the Revolution, during the years of the Stalin Five-Year Plans,

there has been a change in the distribution of the productive forces of Soviet Russia. New centres of the textile industry have developed in the cotton-growing areas ; spinning and weaving mills in Fergan, Ashkhabad, Kirovabad and Leninakan, the Tashkent and Barnaulsk textile combines, and cotton-wool mills in Fergan and Chardzue. A large cotton-spinning mill has also been built at Poltava, in the Ukraine, in the centre of a new cotton growing area.

The manufacturing industries have moved closer to the raw materials bases, and the new distribution will make it possible to satisfy the steadily growing demands of the mills much more thoroughly.

There is ample raw material for the Soviet textile industry within the country itself. In pre-revolutionary days the Russian textile factories were largely supplied with foreign cotton. According to the data of the former Central Cotton Committee, in the years 1912 and 1913, almost half the cotton used in Russia (10·8 million poods) was imported. But, as is well known, at the present time all the Soviet textile industry uses exclusively home-grown cotton. The pre-war level of cotton growing was left far behind during the First Five-Year Plan.

Besides developing the old cotton growing areas, new areas have been created and among these the Ukraine occupies first place. Last year over 30,000 tons of cotton fibre were produced in this area, as compared with 25,000 tons in 1936 and 9,300 tons in 1931. This year the most conservative estimates reckon that the gross collection of cotton fibre will be larger than that of last year.

The technical qualities of the new cotton have been greatly improved and according to the data of the All-Ukrainian Academy of Sciences, the maturity and stoutness of the Ukrainian cotton had increased considerably by 1935. The breaking point of the fibre was four grammes in 1934, and 4·96 grammes in 1935. The breaking-point length was correspondingly increased.

For the last three years the Institute named after Academician Lysenko has been persistently and successfully working to create new types of cotton plant. Hitherto the " 1306 variety " (from American seed) has been sown in the Ukraine. Now new types of cotton, " O.D.1 " and " O.D.2," are being introduced. The All-Ukrainian Academy of Sciences has devoted two years to the study of these new types, and in the opinion of Professor Fedorov and other scientific workers they are a great improvement on the old. In 1938 the Institute named after Lysenko provided nine sorts of cotton of the second generation and on investigation by the Academy of Sciences their technical qualities proved to be superior to those of the cotton sown in 1935.

Last year 42·1 per cent. of all the cotton fibre produced in the Ukraine came into the selected and first grade categories ; 21 per cent. fell into the second and third grade categories. More than half of all the Ukrainian fibre (54·4 per cent.) was 26/27 millimetres long while 29 per cent. was 27/28 millimetres long. This length of fibre and the grade classification of the Ukrainian cotton clearly demonstrate that it is perfectly suitable as a raw material for the textile industry. All the varieties of thread

required by the Ukrainian textile mills can be produced from this raw material. The equipment for the mills can also be produced inside Soviet Russia.

(Extracted from the Monthly Review of the U.S.S.R. Trade Delegation in the United Kingdom)

HOLIDAYS WITH PAY IN SWEDEN

A new Act for paid holidays was adopted by the Swedish Legislature on June 2, 1938, which provides for twelve days' annual holiday. The following details have been taken from the Act :—

" The law came into force on July 1, 1938, but it will not be fully applied until July 1, 1940.

Practically every worker or employee is entitled to paid holidays according to this law provided he has been engaged by the same employer for a minimum of 180 days and provided he has effected the limit of work required.

The possibility of obtaining paid holidays is based upon the work carried out during the calendar year preceding the year when the holidays are due. Thus a person has to work a minimum of 16 days per month in order to be able to get one day of holiday per month. In other words, the number of holidays is dependent on the number of working days effected in the course of one month.

It is not possible for a person to get 12 days until 1940. In 1939 he can only obtain at the maximum 6 days due to the fact that " the time of qualification " for the holidays in 1939 only covers the second half of 1938, i.e., from the 1st July. For instance, if a person has been in the service of an employer from the 1st July, 1938, and has worked 16 days during each of the months July–December, he will get 6 days.

For the holidays in 1940 the time of qualification will cover the whole of 1939, and therefore there is a possibility for the employees to obtain twelve working days provided of course they otherwise fulfil the conditions fixed in the law.

If a person has been engaged by the same employer for the minimum of 180 days and either leaves or is discharged, he is entitled to holiday payment from the employer for the number of days which would be due to him in case he had remained with the same employer. Therefore, a person is entitled to the paid holidays so long as he has fulfilled the conditions of employment of 180 days with any single employer.

In regard to payment for holidays, the law prescribes that the average income, based on the income per day during the time of qualification, is to be paid, unless a person is paid per week or longer periods ; in such cases the salary in question is to be paid.

The law also states that in case better conditions already are in force, these should not be deteriorated.

Finally, the law permits the employer to fix the holiday, but he must give at least a fortnight's notice to the worker, and the holiday must be

taken at the same period unless an agreement to the contrary has been made with the worker."

NEW COLLECTIVE WAGES AGREEMENT IN SWEDEN

A new agreement has been prepared in Sweden, commencing on January 1, 1939, in which wage increases have been obtained providing for an average of 5 per cent. for male workers and $7\frac{1}{2}$ per cent. for female workers. The greater increase for females has been secured to meet a demand put forward by the Union for equal wages to be paid in the lower age limits for both sexes.

A detailed list of the rates of wages paid has also been supplied for time workers. Piece-work prices are fixed so as to provide a minimum increased rate of 15 per cent. over time rates and where such rates do not enable the worker to earn this increased rate the piece rates will be advanced accordingly.

THE INDIAN COTTON INDUSTRY DURING 1938

The Millowners' Association, Bombay, has issued its Annual Mill Statement for the Cotton Year ended August 31, 1938, and the following information is extracted therefrom.

The total number of spindles in the equipped mills of India stood at 10,020,000 on August 31, 1938, as compared with 9,731,000 on August 31, 1937. The number of looms at 300,284 also showed an increase of 3,100. In the City and Island of Bombay, the number of spindles totalled a little over 2.9 millions—a small increase over the figure last year—while the number of looms rose from 66,753 to 67,294.

The total paid-up capital of the industry on August 31, 1938, amounted to Rs. 40.49 lakhs as compared with Rs. 39.83 lakhs on August 31 last year.

In the year ending August 31, 1938, the industry consumed 1,831,000 candies (784 lbs. each) of cotton, which is approximately $2\frac{1}{2}$ lakhs of candies more than last year. The average number of spindles working daily during the year was 8,902,000 out of a total of 10,020,000 erected. The corresponding figures last year were 8,441,000 working out of a total of 9,731,000 erected. Of the 200,000 looms erected, an average of 183,000 were working daily during the year. This compares with the figure of 177,000 working daily in the previous year, out of a total of 198,000.

In the Bombay City and Island, 2,585,000 spindles and 63,000 looms on the average worked regularly during the year, out of the 2,906,000 spindles and 67,000 looms erected.

COLOMBIA

According to the Bank of London and South America, the differences of opinion as to the price which the national textile mills should pay for Colombian-grown cotton continue. Although, as reported in our advices of July 12, last, the Cotton Board fixed the price for such cotton at 66 cents per kilo, the factories are not prepared to pay that figure. The Board has therefore decided that the price should be based upon the total cost of importing similar grades of cotton, which should give a figure of between 60 and 63 cents, but, as planters find this unacceptable, the *impasse* continues. Meanwhile, the major part of the last two cotton crops remains unsold, and a further crop will be harvested in the next two months.

U.S. FAIR LABOUR STANDARDS ACT OF 1938 (WAGES AND HOURS LAW)

The Act was approved June 25, 1938; it became effective October 24, 1938. The following resume was contained in a recent issue of *Commerce Reports*, issued by the Bureau of Foreign and Domestic Commerce, United States Dept. of Commerce.

Hours

The standard workweek for industries engaged in interstate or export commerce is :—

- I. From October 24, 1938, to October 24, 1939—44 hours.
- II. From October 24, 1939, to October 24, 1940—42 hours.
- III. Thereafter—40 hours.

In general, the hours may be increased, but employees must be paid not less than $1\frac{1}{2}$ times their regular hourly rate for all overtime.

Wages

There are two methods of increasing to 40 cents per hour.

(A) I. From October 24, 1938 to October 24, 1939, wages not to be less than 25 cents per hour.

II. From October 24, 1939 to October 24, 1945—30 cents per hour.

III. Thereafter 40 cents per hour—unless such rate would substantially curtail employment.

(B) Where (A) would substantially curtail employment, the Act provides for wage determination by industry committees representing equally employers, employees, and the public.

Industry Committees

Are appointed by the Administrator, given informational, legal, and clerical assistance. May summons witnesses. A wage order made by

Administrator only on Committee recommendation. Hearings held on recommendations. Administrator approves or refers back to committee or a new committee. Committee directed to fix highest maximum rate which :—

I. Will not substantially curtail employment in each classification.

II. Will not give a competitive advantage to any group in the industry.

Regional differentials, or differentials based on age or sex are prohibited. Industry committees are required to reconvene from time to time to make further recommendations. After 1945 a 40-cent wage floor is established and committees and the Administrator can lower this only to prevent a substantial curtailment of employment.

Application in General

Wage and hour provisions apply to :

I. Employees engaged in producing, manufacturing, mining, handling, transporting, or in any manner working on goods moving in interstate commerce.

II. Employees engaged in any process or occupation necessary to the production of such goods.

III. Employees engaged in interstate transportation, transmission, or communication.

Exemptions in General

Neither Wage nor hour provisions apply to :

I. Agricultural workers, seamen and employees of airlines, street car, motorbus, interurban railways and employees of weekly or semi-weekly newspapers with a circulation of less than 3,000, the major part of whose circulation is in the county of publication.

II. Persons employed in a bona fide executive, administrative, professional, or local retailing capacity, or as outside salesmen.

III. Persons employed in any retail or service establishment, the greater part of whose selling or servicing is in intrastate commerce.

IV. Persons employed in fishing and the fishing industry.

V. Persons employed in the area of production to handle or prepare or can agricultural or horticultural commodities for market or to make dairy products.

Exemption from Hour Provisions also extends to employees of employers engaged in the ginning and compressing of cotton and in the processing of cotton seed.

THE ANGLO-AMERICAN AGREEMENT AND THE COTTON TRADE

The United Kingdom-United States Trade Agreement provides for reductions in duties on nearly all United Kingdom cotton piecegoods,

and for many classes of United Kingdom cotton yarns and other cotton manufactures.

The reductions in the duties vary from under one-tenth up to one-half of the old duties.

The duties on cotton yarns over 60's have been reduced by about one-fifth. The United States took no grey, carded, single cotton yarns from the United Kingdom in 1936, but took 1.1 million lbs. of bleached, dyed, combed or plied yarns. In the main class of grey cotton piecegoods in which the United Kingdom is interested (plain-weave, of average counts not above 90's), the duties have been reduced by between one-fifth and one-quarter. This reduction applies only to cloths valued at 70 cents or more per lb., and about 15 per cent. of United Kingdom trade was less than this value in 1936, and will not benefit from the reduction. The duties on plain-weave bleached cloth, of average counts between 61's and 90's, and of average value over 120 cents per lb. (the United States imported 1.1 million square yards from the United Kingdom in 1936), have been brought down by rather more than one quarter. It must be remembered, however, that some of this trade was already entering at reduced rates of duty under the United States-Switzerland Trade Agreement of February, 1936, since the United Kingdom shared the concessions by virtue of her most-favoured nation treaty. The most important reduction in the duties on dyed, printed or coloured cloths is on cloths of average counts between 31's and 50's. The duties on these goods were raised in June, 1936, in order to deal with increased Japanese competition. Under the present Agreement they have been halved, but the new duties will apply only to cloths of over 90 cents per lb. The duties on other types of plain weave, dyed, printed and coloured cloths within certain value limits have been reduced by about one quarter. The total United Kingdom trade in dyed, printed and coloured cloths of types affected by the revisions amounted in 1936 to 2.4 million square yards. A further 1.1 million square yards below the value limit will not benefit from the reductions. The reductions in duties on fancy weave cloths vary widely. The volume of United Kingdom trade affected amounts to about 2.8 million square yards.

In all, out of a trade in cotton piecegoods of about 12 million square yards in 1936, about 10 million square yards will be affected by the duty reductions, and most of the remainder will not benefit because it comes below the value limit.

(Joint Committee of Cotton Trade Organisations' Economic Service)

THE COTTON INDUSTRY IN PORTUGAL

The following is extracted from the Report on Economic and Commercial Conditions in Portugal, by the Commercial Secretary to H.M. Embassy, at Lisbon, August, 1938. The book is printed and published for the Department of Overseas Trade by H.M. Stationery Office, London, price 1s. 6d. net.

Industrial activity was well maintained in northern mills in 1937

and a good deal of overtime was worked. The year was chiefly remarkable for its changes in outlook. During the first quarter of the year there were indications of a record consumption, and "desirable" cotton was very difficult to find. By June, the commodity markets were depressed, and meanwhile the new crop outlook in the U.S.A. had become very good. The subsequent fall in the price of cotton might well have seriously unbalanced the cotton section of the Portuguese mills, which work for a comparatively small market, but they appear to have weathered the storm well, and, with few exceptions, have continued to work full time. The fine spinners' section was helped by orders from Nationalist Spain, where there was a shortage of thread, and fine yarns for the hosiery trade, etc., and a number of these mills were working two shifts during part of the year. The offtake of other goods in the country was very fair, and mills, by accepting narrow margins of profit, ensured that their production went into consumption. Business is not brisk at the moment (August, 1938), and some mills and warehouses are reported to be holding fairly heavy stocks.

During 1937 the Eight Hours Act, which had not always been observed, was strictly enforced. Unless the authorities have been previously informed, heavy fines are imposed on mills which keep any mechanics or workers on after hours, even in the case of a mechanical breakdown necessitating emergency over-time. A number of new decrees were enacted, and old decrees enforced, governing the insurance of workers, provision of a doctor and adequate consulting and operating rooms, changing rooms, washing and bathing facilities for the workers, proper sanitary arrangements, decent dining rooms, etc. All workers with more than three years' service are now entitled to a week's holiday on full pay; those with less than three years' service are entitled to three days' holiday on full pay. Special provision is made for women workers, and crèches are being installed at mills employing more than 500 women. Early in 1938, the Government passed legislation fixing a minimum scale of wages for textile operatives, the basis of which is as follows:—

Spinning.—Blowing room operatives and carders Esc.11\$00; combers speed frames, ring frames and reels Esc.9\$00; doffers and helpers Esc.7\$00.

Weaving.—All weavers and those working on preparatory machines such as winders, pirners and warpers, receive a minimum wage per eight hour day of Esc.9\$00.

Apprentices are not allowed to start work before the age of twelve, and may only be employed to the extent of 10 per cent. of the total of skilled workers in any branch of the trade. The minimum daily wage for apprentices is:—

From 12 to 16 years	..	..	Esc.3\$50
From 16 to 18 years	..	..	Esc.5\$50
From 18 years	..	..	Esc.7\$00

Bleaching, Dyeing and Finishing.—All skilled workers receive a minimum per day of Esc.12\$00. Helpers Esc.9\$00.

Piece Work.—All piece work is subject to the above-mentioned tariffs, and is regulated by the average wage received during the week.

A Comissao Reguladora do Comercio de Algodao em Rama (Commission Controlling the Raw Cotton Trade) has been set up in Lisbon under Government control. Importers of cotton and industrialists are classed separately and must be approved and registered with the Commission. The main objects are to stop speculation and to ensure that the trade is conducted only by fit and proper persons and established firms ; to control and stabilise prices in the interests of all concerned ; and to encourage the growth of desirable cotton in the Portuguese Colonies for use in Portugal. The importation of a quality of Angola cotton fully equal to American Strict Middling 15/16-in. is increasing rapidly ; it receives preferential treatment in regard to duty and charges, and the whole available amount is readily absorbed in Portugal. The charges on imported cotton amount to about Esc.120\$00 a bale, or nearly $\frac{1}{2}$ d. a lb.

Some years ago there was over-production of cotton goods, with consequent short time and distress. Mills are not now allowed to increase their installations without permission, and when machinery is replaced by new, the old machinery has to be scrapped to the satisfaction of a Government Inspector. There was, however, a shortage of fine spinning, and the erection of several new spinning mills has been sanctioned. These are small, and it is doubtful if the number of spindles exceeds 50,000. The importation of second-hand machinery is forbidden it being the object of the Government to improve the general standard of national goods, and, in fact, the quality of textiles in Portugal has greatly improved in recent years, both in point of range and quality. Generally speaking, imports are confined to specialities for which there is a limited sale, *i.e.*, goods that can, therefore, be classed as luxuries. The public insists on fast colours and pure finishes ; “ filled ” goods find little sale as they are regarded with suspicion.

THE GREEK TEXTILE INDUSTRY

Greek consumption of textile raw materials and manufactures is estimated to reach an annual value of 6,000,000,000 to 7,000,000,000 drachmas (£11,000,000 to £13,000,000) according to the U.S.A. *Commerce Reports*. Practically all of the cotton and almost three-fourths of the wool used by local industries are supplied by domestic production, while about 70 per cent. of the manufactured textiles are obtained from local spinning and weaving mills.

Among the various branches of Greek industry, textile manufacture is by far the most important, with a total annual output valued at about 4,000,000,000 drachmas (£7,500,000). The Greek Cotton Institute estimated that cotton production in Greece increased from about 37,000,000 lb. in 1936 to 46,000,000 lb. in 1937. As a result, cotton imports declined from 8,985,000 lb. in 1936 to 6,476,000 lb. in 1937. Of the latter total about one-half came from Egypt and about two-fifths

from India. Imports from the United States were reduced from 1,790,000 lb. in 1936 to only 299,000 lb. in 1937.

The output of the Greek textile industry as a whole recorded a moderate gain in volume and a more substantial gain in value during 1937 as compared with 1936 production. The index of domestic textile production, compiled by the Supreme Economic Council of Greece, rose to 186.9 in 1937, an increase of 3.66 per cent. over the 1936 index of 180.3 (1928 production equals 100). Estimated value of the output advanced from approximately 3,710,105,000 drachmas in 1936 to 4,100,000,000 in 1937. The increase was general and was shared by all branches of the textile industry.

Cotton spinning and weaving are the most active branches of the Greek textile industry. The mills produce a variety of products, the most important being grey cotton sheeting. Second in importance from the standpoint of volume but first in value of production comes wool manufacture; the mills produce a considerable proportion of the wool yarn used by local weavers, and many types of fabrics. Both the cotton and wool mills supply not only a large portion of the domestic demand for the lower-priced cotton and wool yarns and textiles but also Government requirements.

VENEZUELA

In view of the difficult situation of the Venezuelan textile industry for some while past—many mills having been working on part time—an official Commission was appointed to study the matter and, on the basis of its recommendations, the Government has modified the import duty on certain classes of textiles which can be produced locally.

The Government has also decided to put into effect, in respect of stipulated lines of textiles, the Decree of April 11 last, instituting the import quota system. The quotas fixed relate to certain classes of drills, canvas, bedspreads, blankets, towels, etc.; they are expressed by weight and without reference to country of origin, and are for the period from November 15, 1938, to May 15, 1939, inclusive. All shipments of the respective goods which are covered by a Consular Invoice dated subsequent to November 16 are included in the quota.

(Bank of London and South America)

AUSTRALIA

Wage rates in both the woollen and cotton and the knitting sections of the textile industry were increased as from the beginning of the first pay period in December, owing to the increase in the cost of living, as

shown by the figures issued by the Commonwealth Statistician. The increases are as follows :—

For adult males—1s. per week, raising the basic wage to £3 18s.

For adult females—6d. per week, raising the minimum wage to £2 2s.

For juniors—proportionate increases. The new rates for junior workers are set forth in the following table, to which 1s. per week must be added in the case of juniors in the outer and under garment sections of the knitted goods industry. Adult workers in the outer and under garment sections receive the usual addition of 2s. per week as part compensation for lost time :

TEXTILE INDUSTRY

JUNIOR RATES PAYABLE AS FROM THE BEGINNING OF THE FIRST PAY PERIOD IN DECEMBER, 1938

Junior Male Rates

Experience	Commencing Age (Years)					
	15 and under	16	17	18	19	20
1st six months	16/-	17/6	20/-	24/6	30/-	35/-
2nd " "	17/-	19/-	22/6	27/-	33/6	56/-
3rd " "	18/-	20/6	25/-	31/-	37/-	—
4th " "	20/-	23/6	28/-	35/-	56/6	—
5th " "	22/-	26/-	31/6	39/6	—	—
6th " "	25/-	30/6	37/-	58/-	—	—
7th " "	28/-	35/-	44/-	—	—	—
8th " "	34/-	41/-	60/-	—	—	—
9th " "	39/-	48/6	—	—	—	—
10th " "	45/6	62/-	—	—	—	—
11th " "	52/-	—	—	—	—	—
12th " "	58/6	—	—	—	—	—
7th year	65 -	—	—	—	—	—

Junior Female Rates

Experience	Commencing Age (Years)					
	15 and under	16	17	18	19	20
1st six months	14/6	15 -	16 -	17/6	19/6	21 -
2nd " "	15/-	16/6	17/6	19/-	21/6	31/6
3rd " "	17/-	18/6	20/-	22/-	24/6	—
4th " "	18/6	20/-	21/6	24/6	33/6	—
5th " "	20 -	21/6	23/6	26/6	—	—
6th " "	21/6	23/6	26 -	34/-	—	—
7th " "	23/6	26 -	29 -	—	—	—
8th " "	26/-	28/6	37 -	—	—	—
9th " "	27/6	32 -	—	—	—	—
10th " "	29/6	37/6	—	—	—	—
11th " "	33/6	—	—	—	—	—
12th " "	35/6	—	—	—	—	—
7th year	37/6	—	—	—	—	—

(Textile Journal of Australia)

THE COTTON INDUSTRY OF INDIA

In his report upon the Conditions and Prospects of United Kingdom Trade in India, 1937-38 (published by H.M. Stationery Office, London, for the Department of Overseas Trade, price 4s. 6d. net).

Sir Thomas M. Ainscough, H.M. Senior Trade Commissioner in India, Burma and Ceylon, makes the following statement regarding the Indian cotton industry :—

The Indian cotton manufacturing industry has enjoyed a period of activity greater than any it has experienced for over a decade. Production of cloth in all-India rose by over five million yards to the record total of 4,084 million yards. The broadening of demand resulting from the increased purchasing power of the country and also from the relaxation of Japanese competition on account of Japanese preoccupations in China brought a stream of orders, both from home and overseas markets, which called for double shift working in the case of many mills. The average prices realised for cloth were slightly higher than during the previous year. On the other hand, the mills benefited by the heavy fall in the price of raw cotton and other materials which took place during the greater part of the period. In addition to the demands of the domestic market, the easing of Japanese competition in markets such as the Straits Settlements, Ceylon, the Persian Gulf markets, Egypt and other African outlets resulted in a considerable stimulus to the export trade. Burma is also now regarded as an overseas market and is expanding rapidly as an outlet for the Indian industry. Total exports of cloth rose from 101.6 million yards to 241.3 million yards and from Rs.263 to Rs.650 lakhs in value, but it should be noted that the latter figures included shipments to Burma of 94 million yards valued at Rs.2,82 lakhs. Doubt exists as to whether this export revival will continue since the overseas demand for Indian goods was, in the main, due to boycotts, quota restrictions and higher tariffs imposed by certain countries on Japanese goods. Japan's hostilities in China also temporarily affected her ability to export as freely as formerly owing to freight and exchange difficulties. The prospects for the current year would appear to be extremely good. They are tempered only by the outbreak of widespread labour troubles throughout the country and the certainty that wage rates, which have already been materially raised in the Bombay Presidency, Cawnpore and elsewhere, will increase the costs of production. The Bombay Congress Government, as a result of the findings of their Textile Labour Inquiry Committee, insisted on increases of wages ranging from 18 per cent. in the case of the lowest paid labour to 6 per cent. in the case of operatives with a maximum salary of Rs.75 per mensem. This additional cost factor is broadly estimated to increase the cost of cloth by fully 4 per cent. Moreover, the Provincial Congress Governments throughout the country have an ambitious programme for the betterment of labour conditions which must inevitably raise the cost of production still further.

ECUADOR

Imports of cotton are prohibited by law but in view of the expected shortage of local crop, cotton manufacturing interests obtained a permit from the Government for the importation of about 819,000 lbs. of cotton.

It has been stated, however, that in case the crop prospect for the current season should take a more favourable turn, part of the order for the importation will be cancelled. No cotton was imported in 1937-38.

Because of the import control governing entry of cotton goods and the difficulties experienced in obtaining permits for imports of textile goods, the demand for domestic fabrics, it is believed, will increase, resulting in a larger demand for cotton for local consumption. However, the demand for local goods is affected by the current low purchasing power of the population.

The local cotton industry continued to improve slowly during 1937-38. Practically the entire output of the local cotton mills is for domestic consumption. The industry is said to have about 42,000 spindles in place and to employ about 5,000 operatives. Cotton consumption in 1937-38 is estimated at approximately 7,600,000 lbs. or about 15,000 bales.

(Textile Raw Materials)

NEW SPINNING MILL IN IRAN

A large spinning mill was recently opened in Kum in the presence of representatives of the Government. The chairman of the Supervisory Board, Nikopour, who is also president of the Tehran Chamber of Commerce, stated that the wealth of the province of Koum in raw cotton has led to the establishment of the mill. The Kum Spinning Co. was formed in 1936 with a capital of 3,000,000 rials, which was raised last year to 5,000,000 rials. The buildings of the mill cover an area of some 68,000 square metres. The construction of the mill was supervised by a German engineer; the machinery, power plant (360 h.p.) and the electrical equipment were also supplied by German firms. The mill is equipped with 6,328 spindles (5,608 for fine yarns). It is capable of working up 1,100 kgs. raw cotton in ten hours working time, from which about 900 kgs. yarn of counts 6's to 40's will be produced. The mill is to be completed in the near future by an extensive weaving mill and dyehouse.

(Textile Weekly, Manchester)

IMPORT OF PERUVIAN COTTON INTO JAPAN

During a two months' sojourn, the Peruvian Economic and Cultural Delegation which arrived in Japan on September 14, succeeded in coming to an understanding with Japanese business men, concerning Peruvian raw cotton, according to which, Japan will import about 14,000 bales of Peruvian cotton annually. The total value is estimated at about 4,900,000 yen, at a computed price of 350 yen per bale. Japanese exports to Peru of cotton goods is now voluntarily controlled on the Japanese part, but it is understood that the present limit of 680 metric tons a year will be increased.

(Mitsubishi Monthly Circular)

JAPANESE MILLS IN CHINA

The trade control which was instituted to balance Japan's international payments is responsible for the recent recession of the nation's cotton goods exports to a greatly restricted scale and for the consequent appreciable rise of cotton goods prices in Manchoukuo and North and Central China. Yarn 20s., for example, is now (December, 1938) quoted at Y400 per bale and upward in Mukden, while it is changing hands at around Y300 in Tientsin and Shanghai, and the maximum price in Japan Proper is Y221. Indeed, the Japanese cotton mills in China are experiencing a period of the greatest prosperity they have enjoyed in recent years.

Table I. MILLS IN CHINA AND MANCHOUKUO
(In Spindlage)

				Shanghai	Manchoukuo, Kwantung L. T., Tientsin and Hankow	Tsingtao
Naigai Wata Kaisha	..	..	..	280,536	92,384	49,000
Dai Nippon	..	..	..	116,200	—	55,480
Kanegafuchi	..	..	..	110,340	99,400	55,000
Shanghai C. Mfg.	..	..	..	200,904	—	44,000
Toyo	..	..	..	156,058	52,384	—
Japan China S. & W.	..	..	..	183,216	—	—
Toka S.	..	..	..	43,120	—	—
Toyoda C. S. & W.	..	..	..	—	—	38,500
Dah Kong C.	..	..	..	98,000	—	38,500
Fuji-gas	..	..	..	—	—	37,020
Kokko	..	..	..	—	—	33,000
Nisshin	..	..	..	—	—	44,000
Manchufuku	..	..	..	—	29,520	—
Manchuria	..	..	..	—	78,700	—
Tientsin	..	..	..	—	67,348	—

The Japanese cotton spinning mills in Tsingtao which were blown up by the Chinese soldiery late last year, are now being reconstructed. Most of them will have been completely rebuilt by the end of 1938 and will probably be ready to resume capacity operations in the early part of 1939. The Kokko Spinning Company, which purchased the Wah Sing Cotton Spinning Weaving Co. in Tsingtao, was able to begin operating with 23,000 spindles last May, while the remaining 10,000 spindles will soon be installed and will begin working at the end of the year. The reconstruction of the Dah Kong, Naigai and Nisshin spinning mills is also making good progress, and at least partial operations should be possible by the end of the year.

The Japanese cotton mills in Shanghai which are located outside the International Settlement, were more or less damaged during the fighting there, but most of those inside the Settlement escaped. The Naigai Wata Kaisha sustained a minimum of loss, while a mill of the Yu Fong Cotton Spinning & Weaving Company (Toyo S. Co.) located at Yang-shupu, miraculously survived with but a little damage.

According to the Japanese Cotton Spinners' Association in China, the extent to which the Japanese cotton spinning mills in Shanghai were operating at the end of August, 1938, was as follows :—

Table II. OPERATION OF JAPANESE MILLS IN SHANGHAI
(End of August, 1938)

			Per Cent. of Capacity
Dai Nippon	..	..	65.3
Dah Kong	..	..	100.0
Kanegafuchi	..	..	87.5
Naigai Wata	..	..	81.8
Japan China	.	..	95.5
Shanghai	..	.	90.0
Toka	..	..	63.8
Toyoda	..	..	92.3
Toyo	..	..	84.0

According to the same source, Japanese mills in Tientsin were operating at the following rates at the end of August : Tientsin 57.0 per cent., Yue Dah 76.0 per cent., Kanegafuchi 80.5 per cent. and Toyo 100.0 per cent.

The forecast for the 1938 cotton crop in China is for a decrease of 30 per cent. as compared with the previous year, largely due to damage caused by warfare and floods, and consequently anxiety is being felt regarding the smooth supply of cotton to the market. The movement of the " toris " cotton raised in the districts south of the Hwangho cannot be expected to commence before the complete restoration of peace and order in those districts, and as a result the spinners of fine count yarns may be handicapped by a short supply of the material.

On the other hand, the Chinese cotton spinning mills were apparently damaged to the extent of nearly 40 per cent. during the hostilities, and their consumption of raw cotton must decrease proportionately. The raw material cotton requirements of the Japanese mills in China were fully supplied by Chinese cotton even in 1936 and 1937, and it is improbable that a serious shortage in the supply of raw material will develop, since their spindlage has now been reduced.

The Japanese Army, however, is planning to import Chinese cotton into Japan to the extent of two million piculs for military uses, and if this is done, the supply for the cotton mills in China will be correspondingly reduced. A rough estimate places the supply of raw cotton for the year at 70 per cent. of the total demand of the Japanese mills in China. If this estimate proves to be correct, it is fairly certain that the price of the material will soar. Chinese cotton suitable for spinning, which was quoted at Y45 last year, is now worth Y75, a rise of more than 50 per cent. The high price of cotton will of course eat into the spinning profit, but the Japanese mills in China should nevertheless enjoy a sustained period of good earnings conditions at this time when the supply of cotton goods in China is greatly reduced.

(*Oriental Economist*)

THE COTTON INDUSTRY OF MANCHOUKUO

The Cotton textile industry of Manchoukuo received a strong impetus as a result of the European war, and the inflow of Japanese capital during the past ten years has further stimulated the infant industry. Incidentally, close check is kept on the cotton textile output, and no spinning or weaving machinery can be installed except under Government permit. The following figures refer to the equipment of the country's five largest mills as of June 30, 1933, and December 31, 1937 :—

	June 30 1933	Dec. 31 1937
Spindles	156,864	252,180
Doubling Spindles	2,988	4,044
Looms	1,005	3,071

Three of the largest companies sought to increase their spindles by a total of 128,048 before the end of 1938, and another mill with 54,800 spindles is expected to be in operation by March, 1939.

Total consumption of cotton by Manchoukuo mills during the season 1937-38 is reliably reported to have been about 155,000, equivalent 478-lb. bales.

(The Journal of Commerce and Commercial, New York)



25,000

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COTTON TRADE STATISTICS

UNITED KINGDOM EXPORTS OF COTTON GOODS, 1936, 1937 AND 1938

The Board of Trade returns recently issued show the exports of cotton and rayon goods for the year 1938 as follows (with previous figures for comparison) :—

COTTON YARNS GREY (UNBLEACHED)

	1936	1937	1938
	lb.	lb.	lb.
Eire	320,000	328,100	480,600
British West Africa	24,400	23,000	5,000
Union of South Africa	202,500	204,800	156,800
British India :			
Bombay (via Karachi)	9,500	6,400	4,900
Bombay (via other ports)	54,000	30,100	11,900
Madras	69,300	54,800	9,900
Bengal, etc.	219,200	236,000	71,500
Burma	1,500	2,500	—
Total (British India)	353,500	329,800	98,200
Hong-Kong	86,400	84,300	54,000
Australia	285,400	396,100	163,400
Canada	321,000	279,000	244,400
Other British Countries	66,600	129,000	35,800
Finland	166,600	157,900	118,100
Lithuania	204,500	228,600	268,500
Sweden	474,700	449,500	325,400
Norway	554,400	597,400	368,300
Denmark	291,600	240,100	219,000
Poland	300,500	194,600	224,800
Germany	1,897,900	1,968,800	1,877,000
Netherlands	1,824,300	804,400	1,186,300
Belgium	467,300	377,200	198,200
France	86,000	57,300	35,300
Switzerland	416,700	129,500	151,700
Italy	1,900	100	3,600
Austria	94,300	40,100	69,800
Czecho-Slovakia	117,700	426,200	44,000
Yugo-Slavia	96,600	105,200	122,500
Greece	46,500	154,000	44,100
Bulgaria	66,100	58,700	31,800
Rumania	759,400	545,900	277,900
Turkey	83,100	79,700	23,200
China	59,800	16,100	18,300

COTTON YARNS, GREY (UNBLEACHED)--Continued

Japan	92,600	—	—
U.S. of America	116,700	40,300	30,300
Brazil	79,000	110,900	88,200
Uruguay	257,900	133,700	120,300
Argentine Republic	320,100	336,300	237,700
Other Foreign Countries	352,100	530,700	1,042,700
Up to No. 26 count	6,405,100	3,150,400	3,294,400
Over No. 26 count and up to No. 40 count		2,466,300	2,157,000
Over No. 40 count and up to No. 80 count		2,587,300	2,020,500
Over No. 80 count and up to No. 120 count		1,173,500	717,300
Over No. 120 count		179,800	176,000
Total	10,888,100	9,557,300	8,365,200

COTTON YARNS

BLEACHED AND DYED

	1936	1937	1938
	lb.	lb.	lb.
Up to No. 26 count—			
Mercerised	—	171,100	87,600
Not mercerised	—	569,600	491,100
Over No. 26 count and up to No. 40 count—			
* Mercerised	359,500	130,800	119,200
* Not mercerised	695,600	193,900	169,900
Over No. 40 count and up to No. 80 count—			
Mercerised	177,200	194,600	144,800
Not mercerised	94,200	139,600	156,700
Over No. 80 count and up to No. 120 count—			
Mercerised	33,500	40,500	63,100
Not mercerised	23,100	9,100	10,500
Over No. 120 count	20,700	11,600	14,200
Total	1,403,800	1,460,800	1,257,100

* In 1936 included "up to No. 26 count."

COTTON PIECEGOODS

ALL KINDS

	1936	1937	1938
	sq. yds.	sq. yds.	sq. yds.
Eire	2,619,000	1,946,000	2,066,000
Palestine	110,000	115,000	78,000
British West Africa :			
Gambia	572,000	470,000	48,000
Sierra Leone	1,278,000	715,000	599,000
Gold Coast	6,083,000	1,231,000	2,934,000
Nigeria	12,655,000	6,597,000	3,366,000
Total (British West Africa)	20,588,000	9,013,000	6,947,000
Union of South Africa	9,775,000	10,540,000	8,909,000
Southern Rhodesia	822,000	1,088,000	1,174,000
British East Africa	724,000	525,000	508,000
Anglo-Egyptian Sudan	95,000	349,000	163,000
Aden and Dependencies	244,000	303,000	152,000

COTTON TRADE STATISTICS

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COTTON PIECEGOODS, ALL KINDS—*Continued*

British India :						
Bombay (via Karachi)	10,991,000	12,059,000	7,692,000	
Bombay (via other ports) ..	..	..	7,994,000	4,434,000	4,820,000	
Madras ..	..	..	1,931,000	1,753,000	1,393,000	
Bengal, etc. ..	..	..	7,589,000	4,648,000	3,794,000	
Burmah ..	..	..	2,856,000	2,834,000	1,018,000	
Total (British India) ..				31,361,000	25,728,000	18,717,000
British Malaya ..				2,998,000	6,241,000	2,303,000
Ceylon ..	..	..	2,917,000	1,694,000	1,055,000	
Hong-Kong ..	..	..	242,000	344,000	143,000	
Australia ..	..	..	12,526,000	12,508,000	10,529,000	
New Zealand ..	..	..	3,202,000	3,747,000	2,317,000	
Canada ..	..	..	6,648,000	7,084,000	6,014,000	
British West Indian Islands ..	..	..	2,262,000	1,842,000	1,817,000	
British Guiana ..	..	..	153,000	208,000	270,000	
Other British Countries ..	..	..	713,000	1,518,000	965,000	
Finland ..	..	..	823,000	765,000	595,000	
Latvia ..	..	..	342,000	351,000	222,000	
Lithuania ..	..	..	355,000	338,000	420,000	
Sweden ..	..	..	1,486,000	1,679,000	1,451,000	
Norway ..	..	..	1,358,000	1,900,000	1,457,000	
Denmark ..	..	..	3,911,000	3,270,000	6,399,000	
Germany ..	..	..	3,462,000	1,608,000	2,156,000	
Netherlands ..	..	..	2,501,000	960,000	1,016,000	
Belgium ..	..	..	610,000	384,000	363,000	
France ..	..	..	205,000	217,000	137,000	
Switzerland ..	..	..	3,216,000	1,990,000	1,679,000	
Portugal ..	..	..	148,000	100,000	130,000	
Italy ..	..	..	172,000	269,000	282,000	
Austria ..	..	..	217,000	239,000	216,000	
Yugo-Slavia ..	..	..	112,000	95,000	57,000	
Greece ..	..	..	1,895,000	1,248,000	1,048,000	
Rumania ..	..	..	368,000	91,000	48,000	
Turkey ..	..	..	1,203,000	991,000	613,000	
Syria ..	..	..	353,000	297,000	271,000	
Egypt ..	..	..	3,853,000	4,670,000	3,690,000	
Morocco ..	..	..	225,000	105,000	73,000	
French West and Equatorial Africa ..	..	..	5,252,000	2,017,000	1,051,000	
Belgian Congo ..	..	..	278,000	469,000	155,000	
Portuguese East Africa ..	..	..	626,000	717,000	477,000	
Iraq ..	..	..	604,000	820,000	959,000	
Iran ..	..	..	5,912,000	481,000	25,000	
Dutch East Indies ..	..	..	4,339,000	3,946,000	3,023,000	
Philippine Islands ..	..	..	263,000	261,000	195,000	
China ..	..	..	438,000	247,000	103,000	
United States ..	..	..	1,337,000	656,000	541,000	
Cuba ..	..	..	661,000	2,299,000	166,000	
Mexico ..	..	..	322,000	267,000	104,000	
Guatemala ..	..	..	496,000	510,000	255,000	
Salvador ..	..	..	407,000	522,000	95,000	
Colombia ..	..	..	6,593,000	3,589,000	2,169,000	
Venezuela ..	..	..	3,295,000	1,407,000	1,169,000	
Peru ..	..	..	854,000	635,000	406,000	
Chile ..	..	..	818,000	804,000	363,000	
Brazil ..	..	..	90,000	117,000	38,000	
Uruguay ..	..	..	458,000	782,000	430,000	
Argentine Republic ..	..	..	8,717,000	11,404,000	7,883,000	
Other Foreign Countries ..	..	..	3,520,000	2,698,000	2,040,000	
Total				170,084,000	141,038,000	108,104,000
{ Sq. yds. ..				178,091,000	152,539,000	111,605,000
{ Lin. yds. ..				316,214	263,483	198,341
{ Cwts. ..						

COTTON TRADE STATISTICS

RAYON GOODS EXPORTS

	1936	1937	1938
	lb.	lb.	lb.
Yarn, thread and straw wholly of artificial silk or of artificial silk mixed with other materials :			
Singles yarn and straw—			
British India	14,240	10,128	5,667
Australia	209,802	253,147	88,930
Other British Countries	74,701	157,783	85,855
Foreign Countries	309,248	595,237	193,263
Total	607,991	1,016,295	373,715
Doubled or twisted thread advanced beyond the stage of singles yarn	42,622	52,614	26,277
Manufactures, except apparel and embroidery, either wholly of artificial silk (including staple fibre and waste) or of artificial silk mixed with other materials except silk—			
Pile fabrics, damasks, tapestries, brocades and the like	sq. yds. 296,159	sq. yds. 154,499	sq. yds. 148,851
Lace and lace net of all kinds, and material which resembles such lace or lace net	lb. 95,995	lb. 98,027	lb. 71,921
Other tissues (except ribbons)—			
Wholly of artificial silk (including staple fibre and waste)*—	sq. yds.	sq. yds.	sq. yds.
Eire	200,867	165,856	205,808
Union of South Africa	283,877	341,810	423,924
Australia	916,812	619,617	693,564
New Zealand	283,713	350,419	256,136
Other British Countries	503,697	691,457	927,230
Foreign Countries	261,286	313,928	409,527
Total	2,450,252	2,483,087	2,916,289
Of artificial silk (including staple fibre and waste), mixed with other materials except silk*—			
Eire	146,558	152,546	188,010
Union of South Africa	384,972	476,725	280,416
British India	28,007	46,910	40,520
Australia	713,687	517,857	482,852
New Zealand	106,146	97,131	99,915
Canada	94,588	158,181	83,218
Other British Countries	469,198	794,936	336,014
Denmark	167,300	186,546	175,961
Netherlands	55,226	28,882	48,050
Argentine Republic	97,197	151,086	133,573
Other Foreign Countries	289,494	396,935	519,739
Total	2,552,373	3,007,735	2,388,268

* The quantities for 1936 are not completely comparable with those for subsequent years.

MISCELLANEOUS

WORLD COTTON TRADE DURING 1938

The following is extracted from the annual report of Messrs. Reiss Bros., of Liverpool :—

We entered the present season with a record carryover, namely, 13,652,000 bales American and 8,960,000 equivalent 478 lb. bales of other growths, a total of 22,612,000 bales. The supply of all growths is estimated at 50,862,000 bales, against 50,342,000 last season, and an average of about 42,100,000 during the previous six seasons, *i.e.*, since the supply first exceeded 40,000,000 bales. During recent years, there has been a phenomenal increase in production of cotton outside the United States. In 1909-10 it was about $7\frac{1}{4}$ million bales of 478 lbs., but by 1935-36 had reached $15\frac{3}{4}$ millions, and during the past two seasons has exceeded 18 millions. Although the United States loan policy may have afforded some relief to the American grower, it has not provided a remedy for the question of excess supplies. The handicap of smaller acreage has been overcome by means of closer planting, use of best land, more intensive cultivation with liberal fertilising, and, as a result also of ideal growing weather, last year's yield reached the high figure of 266.9 lbs., the crop being 18,412,000 actual bales. The rapid increase of outside cotton has completely turned the scales so that, although 10 to 11 million bales of American are locked up in the loan, causing a virtual shortage of free American cotton, there are still $25\frac{1}{4}$ million bales of foreign cotton uncontrolled and free to compete with American in the world's markets. That this competition is drastic and effective is conclusively proved by the decline of consumption of American outside the United States. From an average of about 8,300,000 bales during 1924-29, it has fallen to 5,800,000 bales for the 1934-38 period. In contrast, consumption of foreign growths, which averaged about 9,700,000 bales in 1924-29 reached the high figure of 17,596,000 in 1936-37, and was 16,635,000 last season.

The crux of the trouble is that productive capacity far exceeds consumption under present disturbed conditions. Economic distress among large sections of the world's population is driving them towards greater self-sufficiency, and cotton growing is being fostered in many new areas. In some cases, imports of cotton and cotton goods are being taxed so that the local cotton growing industry may be financed. America, of course, still produces the largest single crop, her exports being normally equal to the total crop of her nearest rival producer, India, so that the price of the United States staple still largely influences world prices, but not to the same degree as hitherto. Spinners have at their disposal a range of substitute foreign cottons and are switching over to these growths to an increasing extent.

In order to correct the supply position by restrictive measures, some form of concerted action would be necessary on the part of the chief

exporting countries, obviously an extremely difficult task. Alternatively, the desired result might be brought about by a series of crop failures in one or more of the principal producing areas. It appears to us, however, that the evil lies not so much in over-production as in under-consumption, due to the economic balance in Europe and the East being so seriously disturbed. In order further to assist their programme of self-sufficiency, certain countries have encouraged the use of artificial staple fibre. In 1935, world production was 140 million lbs. ; 300 million lbs. in 1936 ; 620 million lbs. in 1937. This rayon staple can be cut to required lengths and spun on cotton machinery or, in longer lengths, can be spun and finished like wool. According to an article published recently by the National City Bank of New York, it can be mixed with cotton, wool, silk or flax. Although present low prices of cotton may cause the competitive production of staple fibres in world markets to deteriorate, it is nevertheless not a negligible competitor. In the United States, synthetic fibres are now used more than wool in the manufacture of clothing. Germany, Italy, and Japan between them account for about 90 per cent. of 1937 production. In Japan, the use of these substitutes may cause a reduction of over a quarter of a million bales in cotton imports per annum.

It will be seen that the problems facing the cotton trade are extremely difficult of solution. To a large extent they have their origin in economic " disease " due to political instability. During recent years, as a result of acute political tension, vast sums of money have been withdrawn from industry and have partaken of the character of flight capital or " hot money," being moved from one country to another and creating still further industrial disturbance by unsettling the exchanges. We have become so accustomed, during these post-war years, to recurring crises that it is difficult to realise the extent to which consumption might have increased under more favourable conditions.

In the meantime, as a result of the large world supply, the United States Loan has been effective only in halting decline by supporting near positions. Should the government maintain its present policy of crop control and loans, the burdensome nature of the supply situation may be further prevented from exerting its full influence, but any modification of the loan programme permitting of freer marketing of American cotton would undoubtedly lead to still further recessions in new crop values. Washington appears now to be alive to the necessity for recapturing foreign markets and this probably explains the recent suggestion that farmers should accept lower loans on future crops, being compensated by increased benefit payments, etc.

THE INCREASE IN RAYON CONSUMPTION

Some further expansion in the use of rayon in the next few years is to be expected but no such tremendous relative gains as those of the past are likely. This view was expressed in a report published recently by a United States Department of Agriculture committee appointed

by Secretary Wallace to study developments in rayon and other synthetic fibres.

The Committee stated that considering its present properties, and its price relative to those of competing fibres, rayon is approaching a limit of expansion in those fields for which it is suitable.

The most notable development during the last five or six years in the field of synthetic fibres has been the sharply increased production and use of rayon staple fibre. From 1931 to 1937 world production increased from 8 million to 623 million lbs., representing in 1931 less than 2 per cent. of the production of all types of rayon, and in 1937—only six years later—more than 34 per cent.

Total world production of all types of rayon has increased at a very high rate each year from 1920 to date, the average rate of increase over the entire period being about 20 per cent. per year. Even during the recent world-wide depression, the production of rayon was increasing rapidly and was nearly 60 per cent. greater in 1933 than in 1929. Beginning with 1934, production again was greatly stimulated, and in 1937 was about 160 per cent. greater than in 1933.

The expansion of rayon has been largely in the field of fabrics, where appearance is of greatest importance—as in household furnishings and clothing, particularly women's clothing. Where durability and low price are of greatest importance, rayon is not able to compete successfully with cotton. By far the bulk of the field now supplied by cotton comes under this classification.

Although large quantities of rayon staple fibre are now used in mixtures with wool, it is not as resilient as the better grades of wool. Thus the expansion of rayon into this field is limited. In like manner there are uses for silk, chiefly women's hosiery, into which rayon stands little chance of appreciable expansion.

The basic substance used in the manufacture of rayon is cellulose, at present obtained chiefly from certain woods and from cotton linters. It is estimated that in 1937 the rayon industry of the United States used 42,000 tons of purified cotton linters (equivalent to about 180,000 bales of raw linters), and 139,000 tons of wood pulp. The use of cotton linters has been declining since 1935, owing to a shift from linters pulp to wood pulp in viscose rayon, but the sharply increased production of acetate and cuprammonium rayon (made wholly from linters pulp) has worked toward maintaining the total consumption of linters in this industry at a fairly high level. In addition to present cellulose sources (spruce, Western hemlock, and cotton linters), which appear to be in no danger of rapid depletion, there are a number of potential sources adequate to meet any expansion likely to occur in the production of rayon. One of the most promising of these is Southern pine. Cellulose from sugar-cane bagasse also has possibilities.

In addition to rayon, there are two other synthetic fibres that have reached the stage of commercial production. One is a staple fibre whose basic substance is casein (in contrast to rayon whose basic substance is cellulose) and the other is a fibre made from glass. Casein staple fibre possesses many chemical properties similar to wool, but at present it is

inferior, physically, to natural wool. Outstanding among the desirable properties of glass fibre textiles is their ability to withstand high temperatures with little or no damage. Also, they are unaffected by many of the chemicals highly injurious to other fibres. Any estimate of the future usefulness of these new fibres is highly speculative.

The report makes no mention of the new "fibre 66"—produced from the raw materials castor oil and phenol (coal tar). It is already being used for toothbrush bristles and wire insulation. Its biggest potential use is in women's hosiery where it will compete with natural silk. The new fibre was announced after the committee had made its report.

"In general," the report concludes, "synthetic fibres in commercial production today have found uses in very definite parts of the textile field. They have many properties distinctly different from those of the natural fibres, making them better suited for some uses, but definitely less suited for others."

Members of the committee are Carl H. Robinson and Robert J. Cheatham of the Bureau of Agricultural Economics, and D. F. J. Lynch and H. P. Holman of the Bureau of Chemistry and Soils.

A copy of the report "Development and Use of Rayon and Other Synthetic Fibres" may be obtained by writing to the Bureau of Chemistry and Soils, United States Department of Agriculture, Washington, D.C.

LIVERPOOL COTTON EXPERTS TO VISIT PERU

Three of the leading representatives of the cotton industry in Liverpool recently sailed for Lima, Peru, to advise and assist in the formation of a cotton market there to be modelled on the lines of the Liverpool market.

The party includes Mr. Glyn Williams, the present vice-president of the Liverpool Cotton Association, as well as two of its ex-presidents, Mr. W. J. Walmsley, who spent a lifetime's experience in the trade with Reynolds & Gibson, and Mr. Norman L. Cappell, the senior partner of Gruning & Co., a house with world-wide ramifications on all commodity markets. They are going to Peru at the invitation of the Sociedad Nacional a Agraria.

STRUCTURE OF A VERTICAL COMBINE

The following is extracted from a paper given by Mr. H. P. Kendall, President of the Kendall Company, Boston, Mass., to the International Management Congress, entitled "The Constituents and Functions of the Administrative Group."

An industrial enterprise owes its health not only to the vigorous articulation of each separate "organ" but to the co-ordination of the various members of the body in such manner as to assure a steady, smooth

and profitable operation of the whole. The responsibility for such operation rests upon the administrative group which must be assured that not only is production carried forward effectively but that it is in a stable relationship with sales ; that accounting not only is in accordance with accepted, sound principles but that the financial structure is well suited to the requirements of the business ; that present products yield the maximum in service and satisfaction to customers and that the research is of vital enough character to have new products ready when obsolescence of old products sets in.

The place of the business in society, the degree of security afforded employees, the effect of operations on the community and many other broader impacts of the enterprise upon its generation are likewise a part of administrative responsibility, as are the many problems of policy and of direction which are peculiarly the mark of this era.

Industry's techniques have developed to such a degree that no longer can the administrator afford to immerse himself in specific technical aspects as has been the case in the past. The growth of technique of management has witnessed phases of specialised attention to one or another aspect. First, production, in which scientific management was born ; then marketing and distribution ; then personnel administration ; then research ; then corporate structure occupied a dominating position in administrative attention. We are in an era now of viewing the administrative task as a whole in its functions and objectives.

No more effective way to deal with the administrative functions presents itself to me than the discussion of a concrete instance, namely, that of the Kendall Company with which nearly forty years of my life have been intimately bound up. Its growth from a small company employing seventy-five people to a small-large enterprise employing an average of 6,000 people, and from one small plant to seventeen, has meant continuous changes and readjustments of the administrative job. We have been students of management all through the years. We have passed through the period of systematised management to a period of scientific management, and our present administrative set-up is not only designed to do a specific type of job, but to do it in accordance with the best principles of management discoverable at the time of their adoption.

The enterprise may be regarded as a completed pyramid, or vertical integration, the base of which is a group of ten cotton mills supplied with their principal raw material by a cotton purchasing company. The mills are single-purpose in type, supplying with a large part of their raw material the three bleach works which form the second layer in the pyramid. Cloth purchased from mills outside is in styles or of constructions not manufactured in the ten mills of the Kendall group, and a certain percentage of cloth similar to that which we produce also passes through the bleach works. Some of these products are ready for sale when they have been bleached and finished.

The third layer of the pyramid comprises three manufacturing establishments, exclusive of two in foreign countries, and two of the three further convert cloth from the bleach works into manufactured

items, such as bandages, surgical dressings, specialities or semi-staples for re-sale in markets other than surgical dressings.

The top layer of the pyramid is formed by two marketing organisations, one in Chicago and one in the north-east. The one in Chicago markets a complete line of surgical dressings to the wholesale and retail drug field for sale to the public, along with other specialities sold through the sporting goods trade and other outlets. The eastern marketing divisions sells all the textiles and the bulk surgical dressings, such as those used by the hospitals, by the Army and Navy, etc.

“DECENTRALISED” WORKING

In 1928, after the company had been enlarged by several recent acquisitions, it was decided to decentralise the operating and the selling, but to retain centralised co-ordination. The plan provided three decentralised operating divisions, each of which, should it ever become necessary, could be divorced from the parent company and go along independently without any impairment of organisation.

The cotton mills comprise one of these operating divisions, with a general manager and an assistant, with its own accounting, cost-finding, purchasing, engineering, personnel and research departments. Most of the production of the cotton mills is sold to another operating division of our company but since it is sold at the market this division has its own marketing expert who sees that the division gets the full market prices, and also sells certain of its products in unbleached form.

The three bleach works, together with the organisation which markets all textile products and specialities and hospital surgical dressings, form the second division. It, too, could be separated from the parent company and be self-sufficient. Its organisation consists of general manager, marketing director, complete sales administration, accounting, costs, purchasing, credits, engineering, personnel and research departments. The third division, with its main plant and general offices in Chicago, includes a single-purpose speciality plant in Indiana, and also a factory in Canada and one in Mexico City, and is responsible for export selling and foreign trade relationships. This division, too, could operate independently. It purchases from and sells to the second division certain raw materials and finished products.

HEADQUARTERS

The president is the chief general administrative officer. His office by design is removed from the nearest divisional office or plant, because such separateness permits viewing the company as a whole and seeing individual plants and other parts of the business in better perspective. Also the general managers and other executives of the divisions are thus in a better position to solve their own problems unaided. If the office of the chief administrative officer were at one of the divisional headquarters the operating executives would tend to share responsibility for decisions, even though capable of deciding for themselves. The president wishes them to take that responsibility, even to the extent of making their own mistakes.

ADVISORY STAFF

In 1928, a special advisory staff was formed. The most experienced functional executives were relieved of operating responsibilities and moved to the president's office where they, too, would be back of the firing lines. This group formed a staff of specialists covering the important functions of the business and pooling the maximum experience in proportion to their numbers. The most experienced administrative man was brought from one of the other divisions and his place filled by an understudy. He was made chairman of the staff. The most experienced sales executive was taken from one of the divisions, the same being done with the most experienced manufacturing man, and the most experienced purchasing agent.

In addition, the assistant treasurer of the company, whose responsibility for the company as a whole consists of the handling of corporation records, taxes, insurance and routine relations with the banks, and the responsibility for cash, is also a member of the staff, as is the comptroller, who has jurisdiction over book-keeping, accounting and cost methods, divisional reports, assembling of budgets and compilation and interpretation of periodic figures and reports.

In addition to these members of the staff, there are two junior members who do not meet regularly with the staff because their responsibility is not so general; one, the personnel director; the other, the director and co-ordinator of research activities. Staff members are on an advisory and consulting basis. They are, for the most part, removed from the operating headquarters of the three divisions. They hold regular meetings and study budgets, trends, and recommend by approving the requests from the three general managers for amounts to be expended on new machinery, additions or extensions, advertising, trade promotion, development of specialties, etc. They also study and recommend as to broad company policies.

The responsibility of the staff as a whole is to the president, and the general managers of the three operating divisions also are responsible directly to him. Individually, staff administrators are called upon for conferences, consultation and advice. The staff man, for example, whose particular field is marketing, is in constant touch with the general marketing divisions. He sits in on advertising conferences, counsels on the development of specialties, on general sales administration, on various sales problems, on legal questions related to sales, and on matters growing out of recent legislation. He is in constant contact with general managers, marketing directors, advertising men and other operating executives in his department.

The staff member whose background has been manufacturing and production likewise confers with the general managers, with the plant managers and engineers on their problems, and the same is true of the specialist in purchasing who analyses trends in basic commodities such as cotton, rubber and textiles and also studies fluctuations of inventories and related factors. The comptroller advises with accounting executives of the three divisions, as does the assistant treasurer on his particular functions.

These staff members are for the most part removed from the firing line. Theoretically they have no direct authority in the operating divisions. Their experience and their freedom from day by day executive decisions allow them to study trends, policies and the various operating reports. They are in a position to advise wisely, both as individuals and collectively. Their function suggests the adage, "Young men for action, old men for counsel."

We have found that picked young men, carefully trained, with a natural aptitude for leadership and executive work, can be turned into first-class executives. Experience and observation over a period of time are necessary for wise counsel. These the older men have and the younger men gain the advantage of it.

The plan makes the three general managers responsible for the operation of their three divisions and they are directly responsible to the president as are the members of the staff. Requests and recommendations by the general managers, for the most part, are studied by the staff, who comment upon them, frequently bringing to bear on a specific matter the broader viewpoint of the company as a whole which helps to shape a more suitable type of action. In matters requiring study and approval of the president, the staff makes recommendations to him, after study. If he approves, instructions pass directly to the general managers and give them authority to act.

In actual practice few orders are given. Usually the general managers and their associate divisional executives agree on a course of action with the staff, or with individuals in the staff, and if a matter is important enough to bring to the attention of the president it is brought in an informal way, and if approval is forthcoming the requests are carried out. Our experience has been that this combination of line and staff has developed a greater ability in the younger operating executives of the divisions to take responsibility. It has necessitated their making their own decisions as well as their own mistakes. It has made it possible for the group of men older in the business to have time to study and plan. They can perform that function by being relieved of operating responsibility and by removal from the scene of action, and the executives can operate more intelligently and with greater confidence when their general policies are approved by men of greater experience, although they are not bound to follow such counsel and advice. The whole plan has worked well through depression and I think our company is stronger for having had this particular set-up.

DIRECTORS

We believe that it is the responsibility of a board of directors to direct ; therefore, our directors are all officers of the company with the exception of our legal counsel. We believe to give us the best service he should follow the policies of the management, be familiar with its problems, legal and otherwise, and have a better acquaintance with the personnel than is sometimes the case with a corporation lawyer. We realise that in many corporations, particularly those of an international character, or larger than ours, it may be desirable to have directors who, although of

slight or no help in operating problems or matters of general policy, may be bankers or otherwise in a position to give confidential advice in financial policies. Also it may be desirable in certain companies to have various geographical regions represented, particularly where there are many branch plants or subsidiaries.

We have felt in our company that we have arrived, so far as number of plants is concerned, at an optimum size—a size which should make it possible to carry on research, publicity, trade promotion, and development of specialities on a relative basis with larger corporations. On the other hand, we believe that we have not become too unwieldly, from a management point of view, for one man as president to grasp the essentials in carrying out his responsibility for policy. We believe that directors should direct much more than is usually found in American corporations, whether large or small. Some corporations proceed on the theory that only the president or possibly the vice-president and treasurer should sit on the board of directors—that other directors should be men who wield influence with the public or who add the broad point of view of general conditions and policy, or who represent special interests or geographical areas.

The combination of line and staff with decentralised operating divisions in the foregoing plan has proved to be a sound adaptation of functional management for our company, and gives an administration which is, we believe, flexible, alert, and one in which the maximum growth of individual executives is permitted. The increasing size of corporate structures and the influence which administrators exert on the lives of those connected with the enterprise demand a corresponding development of administrative responsibility. We believe that this assumption of responsibility and a keen sense of obligation to the community and to society are a primary obligation upon administrators today, and, while we are not in any sense content with our contribution, we believe that the plan we have effected has helped to make administrators who can perform their duties to the upbuilding not only of the enterprise itself but of the community of which it is a part.

(Reproduced from the "Textile Manufacturer")

Wuppertal, a centre of the textile industry in Western Germany, advertises itself to visitors by the novel means of providing handwoven menus, depicting local scenes, in all the local hotels.

RECENT DEVELOPMENT OF THE JAPANESE STAPLE FIBRE INDUSTRY

(Extracted from the *Monthly Circular* of the Mitsubishi Economic Research, Bureau.)

GENERAL REVIEW

The history of staple fibre in Japan dates back to the year 1923. Development at the beginning, however, was very slow, and until 1936

production remained in an experimental stage. In June 1936, differences as to commercial policy with Australia caused a temporary scarcity of wool, and the importance of staple fibre as a substitute gave the industry an impetus to sudden development. The Government encouraged this development by removing the excise tax on staple fibre goods, and the cotton industry took advantage of the situation by using idle spindles for staple yarn manufacturing.

The present emergency which started in July 1937, caused a further advance, as the necessity of war-time economy brought about the compulsory admixture of staple fibre to cotton and wool. Government control even went so far as to reserve pure cotton and woollen cloth for special demand and to make staple fibre the standard textile material for daily use.

Production of staple fibre, consequently, underwent a remarkable increase, and the output by members of the Japan Staple Fibre Associations, together with that by outsiders, totalled 174 million pounds in 1937. Daily productive capacity at the end of July 1938 reached over 1,000 metric tons. Annual production at full capacity would thus reach 800 million lbs., which would exceed the total world production in 1937. The position of Japan in the world production of this textile has thus made a rapid advance, having surpassed Great Britain, the United States, and France in 1935, and now ranking second to Germany.

A weakness of this industry is the comparative shortage of pulp which at present restricts production. With distribution and consumption under official control and with maximum prices having been enforced since June 15, 1938, the industry has in its turn been affected by war-time control, though to a lesser extent than other textile industries.

PRODUCTION

Japanese production of staple fibre is carried on partly by rayon companies and partly by enterprises specialising in staple fibre. The daily production capacity has increased from only 70 metric tons in June 1936 to 130 metric tons at the end of 1936 and 250 metric tons at the end of the first half of 1937. Due to the present emergency, staple fibre secured a very important position as a substitute for cotton and wool, and productive capacity sharply increased to 1,115 metric tons per day. This compares with 3,672 metric tons of cotton spinning and with 839 metric tons in the rayon industry which is of comparatively old standing.

The annual production, which reached only 550,000 lbs. in 1932 increased to 13,600,000 lbs. in 1935. Since that year, the increase has been accelerated, production in 1937 totalling 174,000,000 lbs. or more than 12 times the figure of 1935. Production during the first half of the present year has already reached 168,000,000 lbs., 2.8 times the total of the corresponding period of the previous year. Monthly production increased from the beginning of the year up to May, when a total of 40 million lbs. was reached. If this increase continues, the annual production of this country during the present year is likely to exceed that of Germany. However, import restrictions on pulp may check this tendency, as shown by the decision of the Japan Staple Fibre Association to enforce output curtailment from June to December. Production, consequently,

declined to 27 million lbs. in June, to which, however, must be added 7 million lbs. produced by rayon companies.

STAPLE FIBRE PRODUCTION IN JAPAN

(In 1,000 lbs.)

1932	..	..	..	..	550
1933	..	..	..	..	965
1934	..	..	..	..	4,720
1935	..	..	..	..	13,625
1936	..	..	..	..	45,850
1937	..	..	..	..	167,156
1937—first six months	..	..	..	..	63,115
1937—second six months	..	..	..	..	104,041
1938—first six months	..	..	..	..	175,766
January	..	..	..	..	19,263
February	..	..	..	..	23,310
March	..	..	..	..	26,653
April	..	..	..	..	32,954
May	..	..	..	..	39,201
June	..	..	..	..	34,386
July	..	..	..	..	30,448
August	..	..	..	..	32,701
September	..	..	..	..	33,005

Sources : Rayon Organon (Until 1936), Report of Japan Staple Fibre Association (thereafter).

EXPORT

(a) *Staple Fibre*

Although the staple fibre industry was at first developed as a part of a self-sufficiency programme in textile materials, as production increased and technique advanced, a fair advance has been made in exporting this article.

Export shipments started as early as 1935, but at that time were not important enough to be listed separately in official foreign trade returns until 1937. In 1937, export, especially to the United States, increased greatly. In the latter half of that year, however, shipments declined drastically because of high production costs due to the China incident, increased output in the United States, and the competition of Italian products. In 1938, exports still continued to decline. The total export in the first half year of 1938 was only 166,000 lbs., a small fraction of the export in the same period of last year.

The United States previously was the most important market for Japanese staple fibre, taking 70·9 per cent. in 1937 as against 23·7 per cent. exported to the yen-bloc countries, Manchoukuo, Kwangtung Province, and China. In 1938, however, exports to the United States were stopped, and practically the whole export trade (89·1 per cent.) was directed to the yen-bloc countries, the remainder being shipped to Central America and Egypt.

(b) *Staple Fibre Yarn*

Exports of staple fibre yarn, though not yet large, show an upward trend, the total exported in the first nine months of this year exceeding that of the whole last year. The most important markets in 1937 were

the yen-bloc countries (71.5 per cent.), British India (21.4 per cent.), and the Netherland East Indies (4.5 per cent.).

(c) *Staple Fibre Textiles*

Exports showed a great advance in the first half of this year, during which the total export exceeded that of the whole last year. The advance is continuing in the latter half of this year. The most important products exported are printed muslin, poplin, and serge. In 1937, 60 per cent. of all exports went to the yen-bloc countries, 12.9 per cent. to other Asiatic countries, and 9.1 per cent. to Finland. This year, exports to the yen-bloc countries, Near Eastern countries, Siam, and Philippine advanced remarkably.

EXPORT OF STAPLE FIBRE AND STAPLE FIBRE FABRICS

		1937		1938	
		1st half	2nd half	1st half	July-Sept.
Staple fibre	Quantity (1,000 lbs.)	.. 11,583	3 187	166	73
	Value (Y1,000)	.. 6,242	1,725	92	78
Staple fibre yarn	Quantity (1,000 lbs.)	.. 3,660	4,517	4,711	4,011
	Value (Y1,000)	.. 3,422	3,987	4,330	4,169
Staple fibre tissues	Quantity (1,000 lbs.)	.. 4,911	11,844	17,045	22,206
	Value (Y1,000)	.. 2,067	4,805	6,666	10,140

Note.—Figures based on Monthly Return of Foreign Trade of Japan.

Exports of staple fibre and staple fibre products last year reached to 15.6 per cent. of the total output. The increase in exports notwithstanding a notable decline in cotton, silk, and woollen textiles may be explained by the absence of strong competition. A revolving system, whereby pulp may be imported against vouchers certifying to the export of staple fibre goods, is now enforced to mitigate the present shortage in pulp, the principal raw material.

SUPPLY AND DEMAND OF STAPLE FIBRE

(In 1,000 lbs.)

		1937		1938	
		1st half	2nd half	1st half	July-Sept.
Output of Staple Fibre	.. ..	70,005	104,236	168,742	75,154
Export of Staple Fibre	.. ..	11,583	3,187	166	73
Export of S.F. Yarn	.. ..	3,660	4,517	4,711	4,011
Export of S.F. Tissues	.. ..	1,218	2,937	4,875	5,507
Domestic supply (estimate)	.. ..	53,544	93,595	158,990	65,563

Note.—Staple fibre tissues in square yards=0.248 lbs.

COTTON SUGAR BAGGING

If the strength of a cotton sack containing 360 lbs. of raw sugar lives up to the hopes of cotton men in New Orleans, consumption of American cotton may be increased by 201,562 bales in the near future. Raw sugar has always been shipped in sacks made of jute, but the Lane Cotton Mills

of New Orleans have manufactured a sack which they believe is from two to five times as durable as the jute sack and it costs only 10 cents more.

The cotton sack, which was on exhibit on the floor of the New Orleans Cotton Exchange recently, is now undergoing a test which will either prove or shatter the hopes of the Lane Mills, and other cotton interests. Filled with raw sugar, it is being shipped back and forth between the Smithfield Factory near Baton Rouge and the American Sugar Refinery at Chalmette, La. This will continue until the sack is worn out.

NYLON — A NON-CELLULOSE YARN

Recent reports in the American press refer to the discovery and the development of the first non-cellulose yarn to be produced, namely Nylon, to give it its trade name. This, it is stated, is the generic name for all materials defined scientifically as synthetic fibre-forming polymeric amides having a protein-like chemical structure, derivable from coal, air, and water, or other substances, and characterized by extreme toughness and strength and the peculiar ability to be formed into fibres and various shapes, such as bristles and sheets. Construction is expected to take twelve months and was to have started early in December last.

Filaments of "Nylon" of extreme fineness can be spun, it is stated, much finer than the filaments of silk and rayon. The dyeing presents no particular difficulty; in general it will take dyes used for silk, wool, and acetate, and certain of the direct dyes used for cotton or rayon. Among the prospective uses for "Nylon" is high-twist yarn for the fine hosiery, sewing thread and knit goods, brush bristles, racket strings, fishing lines, narrow fabrics, woven dress goods, velvet, knitted and woven underwear, transparent wrappings film, plastic compositions, textile finishing agents, and coated fabrics. "Nylon" yarn differs from rayon in that it does not contain cellulose and is not derived from cellulose.

WORLD PRODUCTION OF RAYON, 1938

The *Rayon Organon* (New York) states that world production of rayon in 1938 again broke all records with an output of 1,900,000,000 lb., compared with 1,823,000,000 lb. in 1937. The total comprised 975,000,000 lb. of continuous-filament yarn and 925,000,000 lb. of staple fibre, compared with 1,205,000,000 lb. and 618,000,000 lb. respectively in 1937. Production in the United States totalled 257,900,000 lb. last year, compared with 321,600,000 lb. in the previous year, while deliveries to United States consumers amounted to 273,000,800 lb., against 266,200,000 lb. in 1937. Stocks at the end of the year showed a decline of 17,300,000 lb., compared with an increase of 52,900,000 lb. in the previous year.

Reviews on Current Cotton Literature

"COTTON HARVESTING AND HANDLING." By Francis L. Gerdes, Cotton Technologist and William J. Martin, Associate Cotton Technologist Bureau of Agricultural Economics, and Charles A. Bennett, Senior Mechanical Engineer, Bureau of Agricultural Engineering. Published by the United States Department of Agriculture.

To obtain lint of the best quality care in harvesting and handling seed cotton on the farm is as important as care in ginning. The ginner can render his best service only if and when the farmer uses all precautions in his work.

A mutual understanding by cotton farmers and ginnermen of their problems is essential to their practical solution. The average gin, adequately maintained and efficiently operated, can do a good job of ginning on dry, carefully picked, clean cotton. Green, damp, or wet cotton, if ginned without drying, gives rough preparation and grade penalties that amount to as much as 1 or 2 grades, which in dollars and cents may range from \$1 to \$10, or more per bale, depending on the moisture content and staple length of the cotton, and the prevailing premiums or discounts. Damp or wet cotton, moreover, encourages the growth of micro-organisms that destroy quality, both before and after ginning.

Other points for farmers to remember include the following facts. Undue exposure in the field gives discoloured, dull, and trashy lint cotton, and it brings heavy losses to farmers every year. Failure of cotton to fully mature as a result of unfavourable weather, insect infestation, and disease damage is further responsible for some defects in its grade. Excess foreign matter in the seed cotton reduces the value of the ginned product. Rough harvesting or snapping and mechanical harvesting methods consistently produce much lower grades than clean hand picking, even when elaborate cleaning machinery is used.

To obtain good ginning, cotton picked in a green and damp, or a dew laden condition should be dried naturally or artificially before it is ginned. It is seldom advisable to pick cotton when it is actually wet because of the difficulties in drying it, even with mechanical driers. For the usual run of damp or wet cotton, the drying temperatures should not exceed 160° F. and preferably should not exceed 150° F. A slightly higher drying temperature can be used with very wet cotton but under no circumstances should it exceed 200° F. The use of higher temperatures than those cited will "bake" the cotton, weakening the fibre strength and injuring the spinning quality.

For drying in sunshine, green and damp or dew-laden cotton requires about 8 hours of exposure to sun on tarpaulins or sheets. Morning pickings of dew-laden cotton can be dried by exposure in this way during the remainder of the day. Drying is also done by storing cotton in the

open on cabin galleries, sheds, and other farm buildings. Some drying takes place in storage in cotton houses, especially if the cotton is stirred.

The moisture in wet-picked cotton can be reduced on the farm in the same way as that in damp cotton, if weather conditions are favourable long enough. It is desirable for rain-soaked cotton to dry on the plant in the field, but cotton should not be allowed to remain there so long that deterioration from weather exposure surpasses the damage that would come from wet picking and ginning. A month of exposure in the field of most cotton States causes an average loss of one grade.

Cotton, therefore, should be picked as often and cleanly as practicable ; and handled and ginned as efficiently as possible. Prompt and frequent picking is desirable to avoid losses as a result of exposure to weather and other agencies. Clean picking is desirable to avoid inclusion of foreign matter and thereby lowering of grade. And, proper ginning is desirable to prevent injuring and lowering spinning value.

For the good of American cotton, Southern agriculture, and their individual welfares, it is of mutual interest and advantage for cotton farmers and ginners to do these things and to see that these things are done.

“PLY CORD YARNS OF COTTON AND RAYON FOR THE PRODUCTION OF TYRES.” Wolf A. Chatelan (*Melliand Textilberichte*, Heidelberg, German edition, 1938, 12, 962).

The growth of motorisation has made it necessary to go thoroughly into the problem of the production of ply cord yarns for the tyres of motor vehicles, for which purpose cotton was formerly practically exclusively used. After many years of research work, however, a type of rayon has been evolved that presents considerable advantages over cotton. In particular, its heat-resisting properties are higher and its tensile strength is extraordinarily high, so that the average working life of rayon tyres is longer than that of cotton tyres. The author gives details of the manufacture of rayon ply cord yarns and shows that the doubler must observe special precautions in order to turn out a satisfactory article.

“AN INTRODUCTION TO THE STUDY OF SPINNING,” by Prof. W. E. Morton, M.Sc.Tech., F.T.I. Published by Messrs. Longmans Green & Co., London, 267 pages, 12s. 6d. net.

The author of this text book is well known as Professor of Textile Technology in the University of Manchester and Head of the Textile Department of the Manchester College of Technology. He states in the preface that it has been his aim in this book to direct the student's attention in the very beginning to the fundamental nature of the processes through which the raw materials have to go in the course of yarn manufacture ; to show how the evolution of the various modern machines from the original handicraft appliances has been influenced in each case by the character of the raw material it was intended to treat ; and to exclude as far as possible all references to confusing mechanical complications until there is no longer any risk of their crowding out of the picture the things that really matter. In short, he has endeavoured to

prepare the ground for later specialisation in such a way that the student can proceed to the more advanced stages of his work in a restricted field with a proper sense of proportion and in a more inquiring frame of mind.

All the important textile raw materials are dealt with from their source through the various processes to which they are subjected until they are in the form of yarn. Chapters deal with carding, roller drafting, combing, spinning and doubling.

The author is to be congratulated on the production of a very readable text book which is well illustrated with microphotographs and sketches of textile machinery.

"MODERNIZING COTTON GINS" (Farmer's Bulletin, No. 1802), by Charles A. Bennett, Senior Mechanical Engineer, T. L. Bagette, Assistant Agricultural Engineer of the Bureau of Agricultural Engineering and F. L. Gerdes, Cotton Technologist, Bureau of Agricultural Economics. Published by the U.S. Department of Agriculture.

This pamphlet is a resumé of the work undertaken to date by the U.S. Government Cotton Ginning Experimental Station at Stoneville (Miss.). Cotton ginning is undergoing improvements which make it possible to reduce costs, better the quality of the ginned lint, and increase its market value. Both the grower and the ginner are benefited, directly or indirectly, by each advance in ginning practices and each improvement in equipment. The following are the most important features of a modern cotton gin: cotton-drying equipment; cleaners and extractors to serve the regional needs; all-steel cotton handling and ginning machinery; ball-bearing or roller-bearing mechanisms; improved piping and fan installations; pure seed protection by belts and other means; ample shelter and storage facilities for seed cotton and seed, and many other important subjects.

"HANDBUCH DER BAUMWOLLSPINNEREI," by Prof. Dr. Ing. e.h. Otto Johannsen. Published in two volumes by Verlag von Bernh. Friedr. Voigt, Leipzig, Germany, at RM40 in Germany (RM45 post free) and outside Germany RM30 (post free RM33.80) over 400 pages each volume.

These two volumes are the fourth and completely revised edition of the previous well known publication by the Director of the German Textile Research Institute in Reutlingen-Stuttgart. The work has been produced with the object of supplying the advanced textile student and mill man with a book of reference, which covers all the intricate technical details connected with the cotton mill.

There are sections dealing with the various well known systems of high drafting, the spinning of staple fibre, cottonin and cottonised hemp either mixed with cotton or alone. The author deals very thoroughly with the question of testing yarns for strength, stretch, twist, etc., and also gives carefully prepared conversion tables for English and Continental metrical systems.

The student will be interested in the array of micro-photographs especially of those illustrating the various varieties of rayon. Mention

should also be made of the chapter dealing with the testing of cotton and other fibres for moisture.

Another section deals with the production of raw cotton and the preparation of the raw material for marketing.

The volumes contain over 340 illustrations and tables and the work is printed in German in a good readable type.

"TEXTILE MACHINERY SPECIALITIES." Dronsfield Bros. Ltd., Atlas Works, Oldham.

This is the 16th edition of the catalogue of this well known firm of makers of all kinds of Card Grinding Machinery and includes a full and amply illustrated description of the firm's specialities, prominent amongst which are the Dronsfield Patent Traverse Wheel Grinder with the Patent 5-Piece Differential Motion; the Patent Automatic Flat Grinding Machines; the Patent Licker-in Grinding, Dressing and Mounting Machines; the New and Improved Type of Patent 28-Flat Grinding Machine; the Patent Automatic Traverse Wheel "Needle-Point Grinder," No. 192; the Patent Card Makers' Grinding Machine No. 24A, in addition to many other smaller but none the less important inventions.

"COLLINS' TEXTILE DIARY FOR 1939." Published by Collins Clear Type Press, London and Glasgow. Price 1s. 9d. net.

Collins' Textile Diary, as well as containing all the information usually to be found in diaries, presents in a simple practical form some of the generally accepted standards in general use in the various branches of the textile industry. It has been enlarged with the object of rendering available information on the various branches of the subject. The tabular form of presenting data which has been adopted so successfully in Collins' Diaries is again used, and this data will be found useful to the manufacturer and the user of cloths and yarns. The index will be helpful in obtaining quickly any required detail.

"INDIAN COTTON REVIEW." By Messrs. Chunilal Mehta & Co. Ltd., of Bombay.

The eleventh yearly edition of this most interesting and informative publication was issued recently. In addition to the statistical tables which have for a long time past made the Review a reference book, the most important and interesting part appears under the caption "Looking Ahead" on pages 9, 10, 11 and 12. Equally interesting are the statistical tables titled "The money value of Indian crop," "The Indian Cotton Balance Sheet," "Indian Cotton—the World Supply, Distribution and Stocks of Indian Cotton" (which appear on pages 15, 16 and 17 respectively), the Liverpool/Bombay Parity Table (page 28) and the New York/Bombay Parity Table (page 29).

"YEAR BOOK OF THE NEW YORK COTTON EXCHANGE, 1938."

World production of cotton in the 1937-38 season was greater than ever before in the history of the cotton trade, according to a review of

that season contained in the eleventh Cotton Year Book of the New York Cotton Exchange just issued. World consumption was large as measured by the average of past seasons, but it was below world production. In consequence, world stocks at the end of the 1937-38 season were the largest on record.

The production of cotton by the world in the season of 1937-38 reached the extraordinary total of 36,576,000 bales, according to statistics in the book. The largest previous production was 30,851,000 bales in the preceding season. The extremely large world crop was due to the fact that the United States produced more cotton than ever before, while foreign countries produced nearly as much as in the previous season, when they reached a new high record for total output.

World consumption of cotton in 1937-38 aggregated 27,565,000 bales. At that level it was down sharply from the record-breaking total of 30,689,000 in the previous season. However, prior to the last three seasons world consumption of cotton averaged only 25,000,000 to 26,000,000 bales per season.

The Cotton Exchange Year Book was prepared under the direction of Alston H. Garside, Economist of the Exchange. It contains comprehensive statistics on world supply and world distribution of American and foreign growths of cotton, prices of cotton, yarn, and cloth, mill activity, and other data of interest from a cotton market standpoint.

"COTTON BREEDING AND SEED SUPPLY." Published by the International Institute of Agriculture, Villa Umberto 1, Rome. 71 pp.

This publication is an Appendix to the Institute's publication entitled "World Cotton Production and Trade" issued in 1936. The information now published has been collected from books, reviews and questionnaires addressed to institutions engaged in cotton research and Departments of Agriculture.

The book has chapters dealing with methods and objects of breeding propagation and conservation of varieties and the trends of cotton breeding in the chief cotton growing countries of the world. Primarily of interest to the cotton botanist but the cotton mill man will find much instructive information upon the difficulties of the cotton breeder.

"EGYPTIAN COTTON YEAR BOOK, 1937-38." Edited by Armand Lakah & Co. P.O.B. 612, Alexandria, Egypt. Price 10s., post free.

The latest edition of this most excellent reference book for all subjects appertaining to Egyptian cotton (production, varieties, exports, prices, consumption, etc.), fully maintains the high standard set by its founder, the late Mr. George Pilavachi. Besides the aforementioned statistical data, the book contains many well written articles by men whose names are household words in the trade today. An item of particular interest to spinners and manufacturers is a contribution by Mohamed A. Farghaly Bey, President of the Commission de la Bourse de Minet-el-Bassal, on the Quota system for imports of cotton piecegoods into Egypt, which was recently decreed by the Egyptian Government.

"THE TESTING OF YARNS AND FABRICS," by Mr. Harry P. Curtis, F.T.I. Published by Sir Isaac Pitman & Sons Ltd., London. Price 7s. 6d.

This book explains in simple language the modern methods which are used for testing yarns and fabrics to ensure that the consignments are up to sample. Scientific methods, requiring expensive apparatus, are not dealt with, only the methods are given that can be easily carried out. The book should prove of invaluable assistance for all those engaged on the practical or commercial side of the textile industry, as well as to shippers, operatives and students.

"THE EMPIRE COTTON GROWING REVIEW." January, 1939. Published quarterly by P. S. King & Son Ltd., 14 Great Smith Street, London, S.W.1, for the Empire Cotton Growing Corporation.

Noteworthy features of the current issue of the Review are articles on (1) Diseases and Pests of Cotton, by J. W. Munro ; (2) Internal Boll Disease, by W. Nowell ; and (3) American Cotton in the Punjab and in Sind, by Sir William Roberts.

"DIE TEXTILINDUSTRIE DER TURKEI," by Karl Caspar and "DIE ENTWICKELUNG DER TEXTILINDUSTRIE IN DANEMARK," by Helmut Wittmack.

The above two articles appeared in the December issue of the report issued by the Institut für Weltwirtschaft, Kiel, Germany. Both articles deal fully with the historical development of the textile industry in these countries. There are included valuable statistical tables for imports, exports and production of textiles, etc.

"DIE ENTWICKELUNG DER TSCHESCHO-SLOWAKISCHEN TEXTILINDUSTRIE UND DIE ABRETUNG DER SUDETENDEUTSCH TEXTILWIRTSCHAFT," by Karl Caspar, in the Journal of the Institut für Weltwirtschaft Kiel. The author deals with the evolution of the textile industries in Czecho-Slovakia and the Sudeten area since 1928. He also discourses upon the importance of the Sudeten textile industries as export industries, and points out that the industry depends upon the old importing countries to continue trade relations as in the past.

"TEXTILWERKE KENNELBACH" in the Vorarlberg, have issued a most artistic book of 86 pages, commemorating a century of the existence of this well known cotton spinning mill. Besides beautiful illustrations the book contains instructive historical descriptions of conditions of work and costs as they existed in olden times as compared with data of the present day.

A.S.P.

THE INDIAN JOURNAL OF AGRICULTURAL SCIENCE for October, 1938, Volume 8, Part 5—contains a very interesting article upon the Variability of Indian Cottons, of interest to botanists and students. The article is profusely illustrated with plates and photographs.

BOOKS RECEIVED

"INTERNATIONAL TRADE IN CERTAIN RAW MATERIALS AND FOOD-STUFFS BY COUNTRIES OF ORIGIN AND CONSUMPTION. Published by the League of Nations, Geneva. Obtainable from Messrs. Allen & Unwin Ltd., 40 Museum Street, London, W.C.1. Price 5s.

THE FIFTY-SIXTH ANNUAL REPORT OF THE HARRIS INSTITUTE, PRESTON.

"YEAR BOOK OF AGRICULTURE, 1938." By the United States Department of Agriculture, Washington.

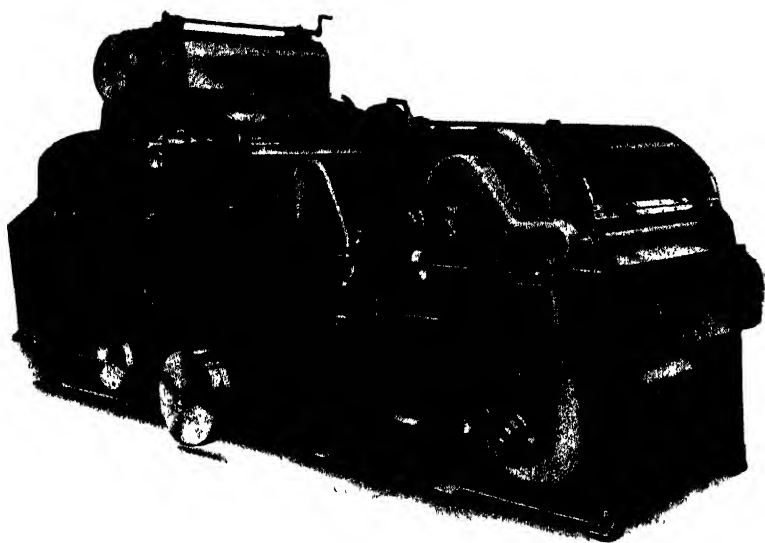
"REPORT OF THE FIRST CONFERENCE OF SCIENTIFIC RESEARCH WORKERS ON COTTON IN INDIA. By the Indian Central Cotton Committee, Bombay. Price 6s. 6d.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN CANADA. By A. R. Bruce, Assistant to H.M. Senior Trade Commissioner in Canada and Newfoundland. Price 2s. 6d.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN BRITISH EAST AFRICA." By A. E. Pollard, H.M. Trade Commissioner in East Africa. Price 1s. 6d.

The last two publications are printed and published for the Department of Overseas Trade by H.M. Stationery Office, London.

"COMPOSICION QUIMICA DE LA PLANTA DE ALGODON. By the Junta Nacional del Algodon, Argentine Ministry of Agriculture, Buenos Aires, Argentine.



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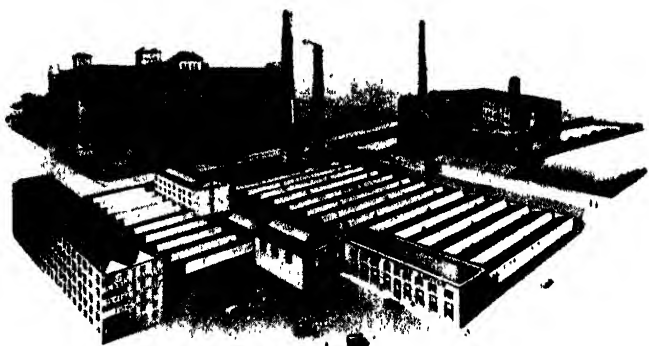
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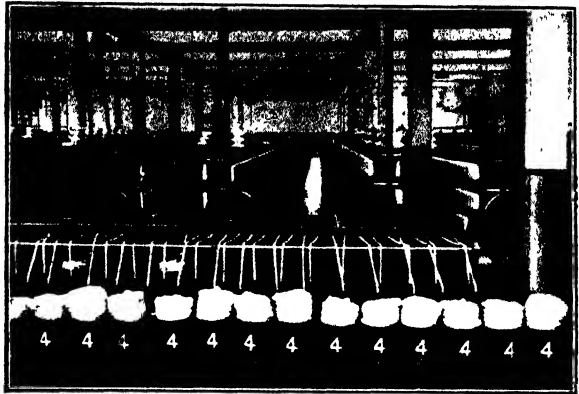


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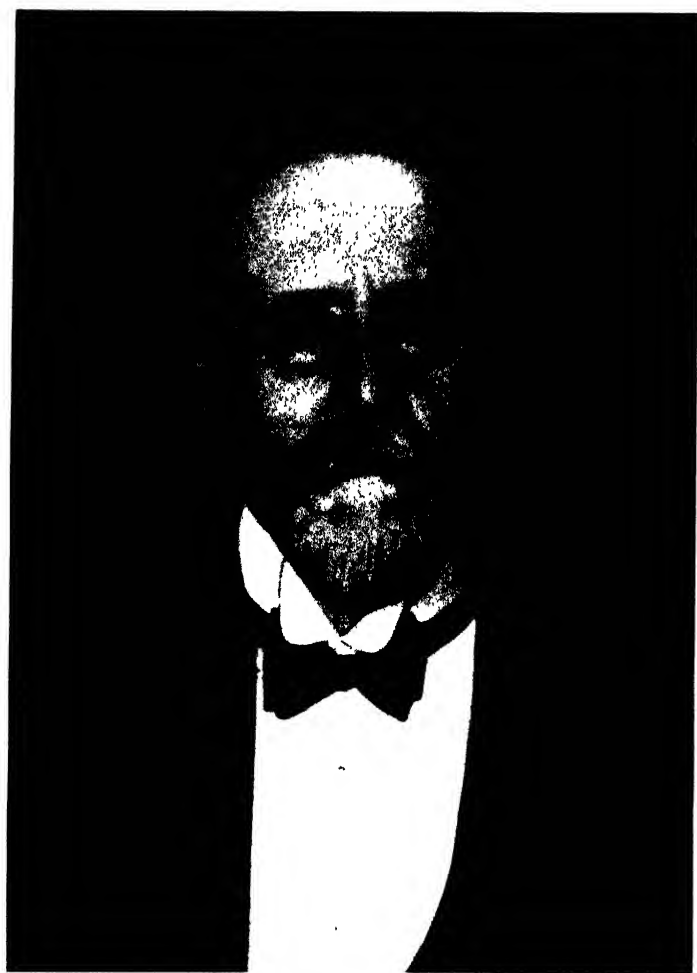
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COMMITTEE'S COMMUNICATIONS

MR. JOHN SYZ

AN APPRECIATION

It is with deep and sincere regret that we record the death of Mr. John Syz, representative of Switzerland on the Management Committee of the International Cotton Federation. Exceeding his 80th year by four days, his passing removes the last of a distinguished list of Founders of the Organisation.

He was born in Brooklyn, U.S.A., his father having emigrated there in 1842 to build up a silk importation business, returning to Switzerland in 1864.

The early life of a great man is always of peculiar interest. In his youthful days the late Mr. Syz showed a keen aptitude for learning.

On completing his studies at the Ecole Commerciale in Lausanne, he entered business as a member of the firm of Cramer-Frey in Zurich. Having the touch of genius which sees and uses the opportunity, he obtained experience as an importer and exporter in Paris and London, and later in New York, until the unexpected death of his father recalled him to Switzerland. Because of his love for the mountains to which he invariably repaired at holiday periods, it was but natural that he should become the General Secretary of the "Uto" section of the Swiss Alpine Club. As his sphere of usefulness and service grew, so did the esteem in which he was held by his fellow-countrymen. One of the reasons why he was so likeable was because he was so full of life and radiated it in whatever he did.

Among other activities, the interests of the Martin Institute for the poor in Erlenchbach, of which he was founder and president, lay very close

to his heart. To the end he retained his association with the Church Council of Grossmunster, and as Chairman he was a vital force.

Although John Syz possessed statesmanlike qualities he never aspired to political fame. It is true that he served as Kantonsrat of the Freisin-nigen party from 1909 to 1917, and as Nationrat from 1916 to 1921. He was ever mindful of the well-being of the people whom he represented so loyally. On the other hand he relentlessly opposed vested interests in any form.

Upon all questions with which he was called upon to deal he brought to bear great foresight, and was generous in his judgments.

He entered the firm of Baumwollweberei Dietikon in 1890, taking it over in its entirety ten years later.

In 1897 he was appointed to the Presidency of the Swiss Spinners' Association, being continuously re-elected for 15 years. As President for nearly two decades he guided the destinies of the Swiss Association of Textile Employers, which dealt with such important matters as new laws, tariffs and industrial relations between employers and workers. In this capacity he revealed a high sense of duty and a clear insight in dealing with difficult and complicated problems which arose from time to time.

During the war he held the unique position of President of the Syndicate for the importation of raw cotton and textile goods. He led a special Commission to the then President of the United States which resulted in Switzerland being assured of deliveries of raw materials such as copper and cotton. He had the honour of being the first representative of Switzerland on the Executive Committee of the International Chamber of Commerce to whose deliberations he brought to bear his wide experience on legal matters and economic subjects which was of inestimable value.

In 1924 he was called to the Presidency of the Swiss Chamber of Commerce and Industry. On his 70th birthday he ascribed this task as being one of the happiest of his life. As an example of his leadership and initiative he was largely instrumental in establishing the customs free area in Zürich.

It was, however, in his work as a member of the International Cotton Committee that I knew him best. The first impressions I gained in 1920 of his qualities of mind and character were strengthened as the years passed.

Possessor of an impressive personality he was a courteous and warm-hearted friend, and ever ready with a cheery word.

The late Mr. Syz played a prominent part in the preparatory foundation work of the International Federation in 1904.

It has been well said that in every man's life there is one supreme hour towards which all earlier experiences move, and from which all future results may be reckoned. This hour, in the case of our departed friend, occurred when he was elected President of the first International Cotton Congress held in Zürich in 1904, jointly convened by the English Federation and the Swiss Association of Cotton Spinners and Manufacturers.

Thanks to the organising abilities of John Syz, the Congress proved an unqualified success. He took as the basis of his presidential address, the Belgian motto, "L'Union fait la Force."

How well he followed this principle in furthering the aims of the International Federation is now a matter of history. His sage advice and ripe experience were of immense value to the organisation whose prestige and influence at all times he strove to enhance.

During the years he filled the office of President with dignity and efficiency. Moreover, he merited the confidence of the Committee and members in taking over the direction and Presidency of the organisation during the years of the Great War. It was a matter of great pride to him when later his services were honoured by having conferred upon him the distinction of Honorary President. We can only echo the tribute paid by Mr. Caspar Jenny at the funeral of the late Mr. Syz when he stated that the cotton industry, not only of Switzerland but of the whole world, had lost a leader. He has left behind a treasured memory. What is more his work will last.

(John Pogson)

ZÜRICH MEETINGS OF THE INTERNATIONAL COTTON COMMITTEE AND THE JOINT EGYPTIAN COTTON COMMITTEE, AUGUST 1939

The Annual Meeting of the Joint Egyptian Cotton Committee will take place this year in Zürich early in August, and will be followed by a Meeting of the International Cotton Committee. A Meeting of the Federation's Sub-Committee on International Standards will precede the Joint Egyptian Cotton Committee Meeting.

The exact meeting place and dates of the meetings will be communicated to members of the various committees at a later date.

The main business before the Joint Egyptian Cotton Committee will be to receive reports upon the working of the new Humidity Agreement, established in November last and to consider the extension of the Agreement, which, at its inception, was made for a period of twelve months as from November 21, 1938.

Other subjects to be discussed include consideration of the advisability of the Egyptian Government convening a conference of exporters, importers and spinners for the purpose of creating Universal Egyptian Cotton Standards for Grade; the cotton policy of the Egyptian Government; Report by the Egyptian Section of the Committee upon the work of the Botanical Section of the Egyptian Ministry of Agriculture; Report by the Spinners' Section upon spinning tests on the more recent varieties of Egyptian cotton, such as Giza 12, Giza 26, Bahtim Abiad, etc.

At the subsequent meeting of the International Cotton Committee attention will largely be focussed upon the discussion anent the

American cotton supply in relation to the United States Government Cotton Policy, also bringing in the present disparity in American Futures, as between near and distant months, together with various attempts, which the United States Government have made to improve the general cotton situation such as the promotion of the one-variety community system. It has been suggested that, if the United States Government makes no move to clarify the present situation in the meantime, a clearly defined policy will be called for by the International Cotton Committee, having for its objects (1) the orderly liquidation of the immense stocks of loan cotton now held under United States Government auspices, in fixed quantities on regular dates so as not to interfere unduly with the state of the market and (2) to ensure the continuity of the supply of cotton of suitable character to the spinner.

The Committee will also discuss *inter alia* the report of its Standards Sub-Committee Meeting held earlier in the week, in conjunction with the resolutions adopted at the Meeting of the International Standards Association held in Breisgau on March 1, 1939, with a view to co-operating further in the work of the International Standards Association.

The President of the Federation, Dr. Hendrik van Delden, of Germany, is due to retire at this meeting, according to rota, it being the turn of England to nominate a president.

Preliminary arrangements for the holding of the International Cotton Congress in England next summer will also be discussed.





BELGIUM

We indicated in our last report that production and deliveries from spinners had shown a slight increase at the end of last year. Further indications of this improvement have been forthcoming during the first quarter of 1939. On the other hand, prices are extremely poor and continue to depreciate.

International events and the internal political situation have led the manufacturers to put down important contracts for yarn. This business—which seemed justifiable after purchasers have withheld from the market for so long a period—has been in evidence now for the past two or three weeks.

Since then, the market has become featureless. The increase in wages granted by the textile industry last January in consequence of the rise in the retail price index will be withdrawn as from April 8, this index having recently registered a decline.

Taking wages paid in July, 1936, as representing 100, those paid on April 8 of this year could be estimated at 108.25.

The original text in French runs as follows :—

Nous avons signalé dans notre rapport précédent que la production et les livraisons des filatures marquaient une légère tendance à se redresser à la fin de l'année écoulée.

Cette tendance s'est confirmée pendant le premier trimestre de 1939.

Par contre les prix sont franchement mauvais et leur avilissement s'accroît encore.

Les événements internationaux et des circonstances de politique intérieure ont amené les tisseurs à conclure d'importants contrats de filés : ces transactions—qui semblaient d'ailleurs justifiées après une longue abstention du marché—ont été notées pendant deux ou trois semaines.

Depuis lors le marché est devenu creux.

La hausse des salaires, accordée par l'industrie textile depuis janvier dernier comme suite à la hausse de l'indice des prix de détail, sera reprise à partir du 8 avril, cet indice ayant de nouveau baissé.

Les salaires payés en juillet 1936 étant représentés par 100 ; ceux qui seront payés le 8 avril seront représentés par 108.25.

(Association Belge des Filateurs de Coton, Gand)

PROTECTORATE OF BOHEMIA AND MORAVIA

The degree of occupation of the cotton spinning mills in the period under review has been on the whole very good. Even the political events from the middle of March did not essentially change this activity.

The effective production in the Egyptian section can be estimated at 15 to 20 per cent. above the normal full time production, whereas the mills of the American section ran at about 85 per cent. of their capacity.

If we take into consideration both these figures, we estimate that the activity of the mills had been equal to approximately 100 per cent. of full time production.

There has been no alteration in the rates of wages, but on May 1 there will come into force a new collective agreement, providing a 10 per cent. increase of the present rates of wages.

(Hospodarsky Svaz C. Pradelen Bavlny Zapsané Společenstvo S.R.O.)

CHINA

In consequence of a shortage of raw cotton, the Japanese cotton mills in North China have had to reduce their activity; the mills in Tientsin and Tsingtao have, it is said, curtailed by 85 per cent. The present shortage is due to the control of supplies. According to the allotments laid down by the Planning Board for the year ending August 31, 1939, 1,303,000 piculs of North China cotton were to be furnished to Japan, 561,000 piculs to Manchukuo, 1,178,000 piculs to North China, and 258,000 piculs to Central China. The Japanese mills in North China have, however, consumed 687,166 piculs (Tientsin and Tsingtao 462,349 piculs) to the end of January this year, whereas this quantity should have sufficed to the end of March. It has therefore been decided to transfer cotton from Central China out of the allotment, as the Japanese cotton mills in that quarter can obtain raw cotton produced there or foreign cotton to make up. The Tientsin and Tsingtao mills will thus be able to reduce the rate of curtailment from 85 to 30 per cent.

ENGLAND

SPINNING SECTION

The state of trade in the English cotton spinning and manufacturing industry this year has shown a falling off as compared with the corresponding period of a year ago, although in the Egyptian spinning section production was a little better than in the first quarter of 1938.

In the spinning mills of Lancashire, taking both the American and Egyptian sections together, production in the period under review would represent no more than about 75 per cent. of capacity.

Renewed anxiety in the international situation plays a very important part in the demand for Lancashire goods, since buyers are naturally standing aloof from placing orders under circumstances which involve difficult forward trading.

MANUFACTURING SECTION

After the unprecedented depression in the industry during the latter part of 1938, there had been some indication of an improvement both in activity of machinery and in prices. However, the seriousness of the European political situation, with recurrent crises and the possibility of even graver results has undermined confidence, and naturally, buyers are refraining from placing orders until there is some concrete indication of a return to normal conditions.

This factor has particularly affected the export trade, but in the home market demand has been rather better, although no doubt much of the buying has been of a seasonal nature.

Apart from general world conditions the Lancashire industry is concerned as to developments in U.S.A. raw cotton policy, as this will have a marked effect upon prices.

FRANCE

We indicated in the previous issue of the *International Cotton Bulletin* that at the end of last quarter some improvement in demand had taken place, unfortunately without bringing in its train any corresponding improvement in prices.

This same situation has been maintained during the course of the first quarter of 1939 with, however, certain fluctuations. Prices continue to show but little remuneration to sellers.

Some individual firms are still working short time. On the contrary, others are working full time or even overtime, but the working week mostly in operation is that of 40 hours. On the other hand a number of factories are completely closed. Having regard to the mills entirely closed, to machinery stopped for one reason or another in working mills, and to short time still in operation, the degree of activity in the industry could be estimated at the end of February at 85.9% for the spinning section and 87.2% for the weaving section.

No changes have taken place in wage rates during the quarter under review.

The original text in French runs as follows :—

Nous signalions dans le dernier No. du Bulletin qu'à la fin du dernier trimestre une certaine amélioration de la demande s'était produite à laquelle ne correspondait malheureusement pas une amélioration équivalente des prix.

Cette situation s'est exactement maintenue au cours du premier trimestre 1939 avec cependant certaines oscillations. Quant aux prix ils demeurent encore peu rémunérateurs.

Quelques firmes pratiquent encore individuellement du short time. D'autres au contraire font des heures de récupération ou même des heures supplémentaires mais la durée de travail la plus généralement pratiquée est celle de 40 heures. Par ailleurs il existe encore un certain nombre d'usines complètement fermées. Compte tenu de cet outillage

entièrement inactif, de l'outillage arrêté pour une cause quelconque dans les établissements en activité et du short time encore pratiqué, l'indice d'activité des manufactures ressortait fin février à 85,9% pour la filature et à 87,2% pour le tissage.

Aucune modification de salaires n'est intervenue au cours du trimestre en revue.

IMPORTATIONS ET EXPORTATIONS

IMPORTS AND EXPORTS

				Années :	
				1937	1938
				Quintaux	Métriques
				(In metric quintals)	
A—Importations : (<i>Imports</i>)					
1.	Fils de coton	..	..	13,519	4,803
	(<i>Cotton Yarn</i>)				
2.	Tissus de coton	..	..	16,189	8,344
	(<i>Cotton Piecegoods</i>)				
B—Exportations : (<i>Exports</i>)					
1.	Fils de coton : Exportation totales			71,454	92,352
	(<i>Cotton Yarn—Total Exports</i>)				
	Destinations : Algérie, Colonies et				
	Pays de Protectorat			22,919	33,330
	(<i>Algeria, Colonies and Protectorates</i>)				
	Marchés étrangers	..	..	48,535	59,022
	(<i>Foreign Markets</i>)				
2.	Tissus de coton : Exportations totales			385,398	476,255
	(<i>Cotton Piecegoods—Total Exports</i>)				
	Destinations : Algérie, Colonies et				
	Pays de Protectorat	..	..	354,192	435,348
	(<i>Algeria, Colonies and Protectorates</i>)				
	Marchés étrangers	..	..	31,206	40,907
	(<i>Foreign Markets</i>)				

(*Syndicat Général de l'Industrie Cotonnière Française*)

GERMANY

SPINNING SECTION

In the first quarter of 1939 there was no important change, as compared with the previous months, in the general business outlook and activity of the German cotton spinning section. Production and demand of yarns for the home market, and also for abroad, remained the same, with the result that the degree of occupation has been as heretofore.

The following is the original report in German :—

Auch im 1. Quartal des Jahres 1939 ist gegenüber den vorausgegangenen Monaten eine nennenswerte Änderung in der allgemeinen Geschäftslage der deutschen Baumwollspinnereien nicht eingetreten; Erzeugung und Absatz der Gespinste nach dem Inlande und dem Auslande, und damit der Beschäftigungsgrad der Betriebe hielten sich durchweg auf dem bisherigen Stand.

(*Fachgruppe Baumwollspinnerei
der Wirtschaftsgruppe Textilindustrie, Berlin*)

WEAVING SECTION

Although the orders received during the first quarter of 1939 were somewhat lower than those of the fourth quarter of 1938, the demand on current contracts in the first quarter of 1939 as compared with the fourth quarter of 1938 has experienced an improvement.

The orders on hand at the end of the first quarter of 1939 assured a full occupation of the looms for approximately three months. Consequently in this direction there is no important alteration as compared with the fourth quarter of 1938.

The very satisfactory degree of occupation of the weaving mills has remained approximately unchanged.

The following is the original report in German :—

Während der Auftragseingang im 1. Quartal 1939 etwas hinter dem Auftrageingang des 4. Quartals 1938 zurückblieb, hat der Abruf auf bestehende Kontrakte im 1. Quartal 1939 gegenüber dem 4. Quartal 1938 eine Belebung erfahren.

Der Auftragsbestand am Ende des 1. Quartals 1939 sichert eine Beschäftigung der Webstühle für etwa 3 Monate. Es ist also in dieser Hinsicht gegenüber dem Ende des 4. Quartals 1938 keine wesentliche Veränderung eingetreten.

Auch die sehr befriedigende Beschäftigung der Weberei blieb nahezu unverändert.

(Süddeutsche Bezirksgruppe der Fachuntergruppe Rohweberer)

HOLLAND

COTTON SPINNING

The demand for cotton yarns has somewhat improved and on the whole spinners are better engaged than a few months ago. Margins are still unsatisfactory, chiefly on account of cheap imports of yarns from Belgium and France. Since March 1, 1939, imports of cotton yarns into Holland are subject to an import duty of 3 per cent. *ad valorem*. So far this duty has not had any effect on the prices for the home market.

COTTON MANUFACTURING

There is an increased demand for cotton goods both for the home trade and for export and most manufacturers are comparatively well engaged. Prices obtainable, however, are in most cases too low, but there seems to be a tendency not to accept the very low offers of a few months ago.

The degree of occupation in the industry has also improved, and the number of workpeople employed in the cotton industry in Holland during recent months amounted to :—

First week of August, 1938	..	31,000
October, 1938	..	33,356
December, 1938	..	34,076
February, 1939	..	35,133

There has been no alteration in wages during the last few months.

HUNGARY

The condition of the Hungarian cotton industry remained unchanged during recent months, from a general point of view. The most important figures of foreign trade, as to cotton industry, are as follows :—

Imports, 1938			Quintals
Raw cotton	..	..	267,200
Cotton yarns	..	..	8,148
Cotton piecegoods	..	..	5,691
Exports, 1938			Quintals
Cotton yarns	..	..	681
Cotton piecegoods	..	..	10,658

The main part of exported cotton goods consists of printed fabrics.

(*Magyar Textilgyárosok Országos Egyesülete*)

ITALY

During the first quarter of 1939 the Italian cotton industry showed an unchanged productive activity. The sales in the home market remained normal ; shipments abroad on the whole improved as compared with the same period of last year. Employment has again slightly increased.

The following is the original report in Italian :—

Durante il primo trimestre 1939 l'industria cotoniera italiana ha segnato una attività produttiva stazionaria.

Le vendite sul mercato interno sono state regolari ; le spedizioni all'estero hanno, nel complesso, migliorato rispetto allo stesso periodo dell'anno precedente.

L'occupazione operaia è ancora leggermente aumentata.

(*Federazione Nazionale Fascista degli Industriali Cotonieri, Milan*)

JAPAN

After a slight improvement at the turn of the year the cotton piecegoods market has been steadily regaining strength. At the end of January jeans 20×20 attained a level above ¥2.90 for current month and ¥3.00 for distant month delivery, which was a rise of more than 15% over the low of ¥2.53 that prevailed towards the end of last year. Adonis chop double widths shirting advanced to ¥10.90 from the former ¥9.80 and Daffodil chop class to ¥10.90 from ¥9.80. The price improvement has been remarkable in view of the fact that it has occurred within the short space of one month. The earlier market collapse had been brought about largely by price slashing tactics which piecegoods producers and exporters adopted, to their own injury, under the individual link system. The present recovery under the same link system may appear puzzling, but the facts of the matter are as follows : Firstly, about the time when bitter opposition was raised against the individual link system towards the end of last year, spinning companies began refraining from selling as they

were no longer in the mood to stand further sacrifice selling. They have continued to maintain this attitude since the first of this year, rejecting all bids from abroad below their idea of what is suitable. Meantime the agitation for a reform of the link system has taken practical shape, chiefly through the action of smaller spinning companies in regulating the piecegoods supply instead of forming the suggested co-operative export marketing company, as is clearly shown by recent developments. The smaller firms' action has proved an added factor tending to stiffen the attitude of the spinning companies still further against low limits from buyers abroad, with the result that prices for export items have taken an upward swing. It is not known just when the reformed link system will be officially announced and enforced, but it is worthy of note that the producers have adopted a definite attitude of abstaining from production entirely unless they can obtain the prices they deem suitable, and have entirely abandoned their former attitude of merely withholding offers when the buyer idea was below their already very low prices. Parallel with the above, the system of fixed maximum export prices has been abolished and the obligatory period for export has been extended. The combination of these factors has acted to deliver the cotton yarn and piecegoods community from the gloomy conditions which characterised the closing weeks of last year, and now the industry and trade are slowly but steadily coming back to life.

(*Oriental Economist*)

POLAND

DEGREE OF OCCUPATION OF COTTON MILLS

	Aver.			
Dec. 26, 1938—Jan. 22, 1939	38.03 hours	79.22%	of full time prod (48 hrs.)	
Jan. 23—Feb. 19, 1939	47.31 ..	98.56%	"	"
Feb. 20—March 19, 1939	52.34 ..	109.04%	"	"

EXPORTS OF COTTON GOODS

		Piecegoods	Clothing
	value	weight	weight
January 1939	673.880 zl.	130.416 kg.	77.253 kg.
February "	224.977 "	40.896 "	63.462 "
March "	424.177 "	75.940 "	76.357 "

(*Zrzeszenie Producentow Przedzwy Bawelnianej w Polsce*)

PORTUGAL

The decline in the activity of the cotton manufacturing plants during the second half of 1938 was even greater than in the first half of the year, and conditions on the whole were very unfavourable. While this is accounted for to some extent by the falling off in the domestic demand, the main factor was the sharp reduction in the exports of cotton yarn to Nationalist Spain, owing to competition from Belgian and British spinners. It is said that while exports of cotton yarn to that country amounted to about 10,000 metric tons in 1937, shipments in 1938 were probably less than one-fourth of that quantity. The spinning mills were, therefore,

in a considerably more unfavourable condition than the weaving mills. Most of the mills were operating part time during the year. The demand from Portuguese colonies likewise declined, owing to Japanese competition.
(U.S. Department of Commerce)

SWITZERLAND

As reported in our communication covering the State of Trade for the last quarter of 1938, when we were able to state that the degree of activity during that period had been maintained, we are now able to report that during the first quarter of 1939 the degree of production is still being maintained, with the result that organised short-time for the fine-weaving and coloured weaving section has been slightly reduced. The increased demand for fine yarns and cloths, especially, has had a favourable influence upon production in the doubling section. An increase in the takings of coloured woven goods has also had its effect upon the coarse and medium fine counts sections in so far as orders have increased, but this has not increased to any satisfactory extent the number of operatives in work. On the whole, coarse and medium-fine goods have been neglected, so that about a quarter of the operatives employed in this section have been placed on short time.

Wages have not been subject to any alteration.

The following is the original report in German :—

Die zu Ende 1938 festgestellte bessere Beschäftigung hat auf der ganzen Linie auch im 1. Quartal 1939 angehalten und gestattete es, die kollektiven Produktionseinschränkungen für Fein und Buntweberei etwas zu mildern. Speziell die regere Nachfrage nach feinen Gespinsten und Geweben beeinflusste auch den Gang der Zwirnerie günstig. Die Absatzbelebung in bunten Geweben verschaffte auch Grob- und Mittelfeinspinnerei vermehrte Aufträge, reichte aber zu einem befriedigenden Arbeitsvolumen nicht aus. Grobe und mittelfeine Gewebe blieben weiterhin mehrheitlich vernachlässigt, sodass rund ein Viertel der Belegschaft unter Teilarbeitslosigkeit litt.

Die Löhne haben keine Veränderung erfahren.

(Schweizerischer Spinner-Zwirner und Weberverein)



AFGHANISTAN

An effort to stimulate cotton cultivation and manufacture in Afghanistan is indicated by reports published in the Afghan Press.

It is stated that a company has been formed in North Afghanistan with a capital of thirty million Afghanis and that this company has arranged for the import of a large quantity of cotton seed for sowing purposes. Ginning factories are being opened at four places in North Afghanistan, while work is in progress on a textile factory at Pul-i-Khumri with a capital of fifty-one million Afghanis.

ARGENTINA

The first official estimate of cotton production in Argentina indicates a prospective crop of 387,419 bales (478 lbs.) for the 1938-39 season. The trade, however, believes the crop will be somewhat smaller. This year's estimate represents a substantial increase over the first official estimate of 332,074 bales and the final estimate of 237,271 bales for the 1937-38 season.

ARGENTINA: COTTON ACREAGE, PRODUCTION AND YIELD; AVERAGE 1929-30 TO 1933-34; ANNUAL 1933-34 TO 1938-39.

Period	Area Harvested Acres	Production Bales of 478 lbs.	Yield per acre lbs.
Average 1929-30 to 1933-34	*355,356	161,627	†217
1933-34	*481,845	199,968	†198
1934-35	*707,069	295,352	†200
1935-36	763,129	373,385	234
1936-37	713,452	143,760	96
1937-38	814,671	237,271	139
1938-39‡	*1,004,956	387,419	†184

Taken from Boletín Mensual Junta Nacional del Algodón, Ministerio de Agricultura, Buenos Aires, January, 1939.

* Acres planted. † Yield based on acres planted. ‡ Preliminary.

Growing conditions so far have been very satisfactory in the Chaco Territory, which produces about 70 per cent. of the total Argentine crop. Insect pests which have seriously affected growing crops in former years, have been practically absent in the Chaco this season. The outlook in other cotton-producing districts is generally fair except in the territories of Formosa and Misiones, where considerable insect damage is reported. Recent rains in most of the cotton-growing areas of Argentina have alleviated drought conditions existing earlier in the season.

Exports of cotton from Argentina during 1938 amounted to 103,132 bales (478 lbs.) compared with 57,559 bales in 1937. Germany was the leading purchaser in 1938, accounting for 75 per cent. of total exports. The bulk of the 1938 shipments was composed of the lower grades, the better grades being consumed locally.

ARGENTINA : EXPORTS OF COTTON BY PRINCIPAL COUNTRIES OF DESTINATION,
AVERAGE 1930-1934, ANNUAL 1935-1938
(In Bales of 478 lbs. net)

Country	Average 1930-1934 Bales	1935 Bales	1936 Bales	1937 Bales	1938* Bales
United Kingdom ..	69,290	47,952	97,353	26,437	2,564
Germany ..	18,852	59,409	43,243	20,672	77,373
France and Belgium ..	19,103	14,971	12,762	3,049	2,094
Italy ..	3,218	5,424	4,737	2,375	—
Netherlands ..	†88	12,845	15,469	1,139	770
Japan ..	†401	3,999	17,355	3,487	420
Others ..	7,834	22,954	36,021	400	19,911
Total‡ ..	118,590	167,554	226,940	57,559	103,132

Compiled from Anuario del Comercio Exterior de la Republica Argentina.

* Preliminary.

† Three-year average 1932-1934 ; 1930 and 1931 included in "others."

‡ Includes re-exports.

(U.S. Department of Agriculture)

AREA PLANTED TO COTTON IN ARGENTINA ; PRODUCTION OF RAW COTTON, FIBRE
AND SEED ; EXPORT AND LOCAL CONSUMPTION FIGURES FROM SEASON 1914-15 TO
SEASON 1938-39.

Crop Season	Area Planted (Hectares)	Production		Export Lint (in tons)	Local Consumption Lint (in tons)
		Seed Cotton (in tons)	Lint (in tons)		
1914-15	3,300	2,640	792	26	593
1915-16	3,790	2,052	886	54	701
1916-17	3,075	2,460	689	152	1,152
1917-18	11,775	9,420	2,638	627	1,444
1918-19	13,135	10,508	3,047	1,382	1,283
1919-20	13,350	10,680	3,097	3,014	1,565
1920-21	22,864	19,088	5,536	2,691	841
1921-22	15,615	12,490	3,497	4,028	1,481
1922-23	62,658	43,860	12,759	5,057	3,166
1923-24	22,864	19,434	5,636	3,452	4,435
1924-25	104,513	51,105	14,435	11,057	5,935
1925-26	110,058	103,263	31,300	22,641	4,394
1926-27	71,746	43,193	13,101	9,246	5,597
1927-28	85,000	82,765	23,200	17,911	4,059
1928-29	103,710	92,644	25,690	23,598	4,706
1929-30	122,000	115,404	32,614	27,597	4,047
1930-31	127,394	107,324	30,051	25,018	6,154
1931-32	136,159	124,994	36,686	28,272	8,464
1932-33	138,500	113,318	32,511	20,564	12,202
1933-34	195,000	155,236	43,357	27,112	18,000
1934-35	286,147	238,285	64,038	36,300	25,000
1935-36	368,000	291,701	80,957	59,217	21,740
1936-37	410,900	113,139	31,170	12,480	18,690
1937-38	424,030	187,394	51,445	22,539*	23,509‡
1938-39	406,700†	—	—	—	—

* Exports to December 30, 1938. † Estimate of the Junta Nacional del Algodón.

‡ Consumption to October 30.

CLASSIFICATION OF THE ARGENTINE COTTON CROP OF 1937-38, ACCORDING TO
GRADE AND STAPLE LENGTH
(Figures prepared by the Junta Nacional del Algodón)

Grade	(A) Grade		Mm.	(B) Staple Length	
	No. of Samples	Per Cent.		No. of Samples	Per Cent.
—	—	—	29	18	0.06
—	—	—	28	241	0.74
A	438	1.35	27	2,118	6.51
B	6,789	20.88	26	5,451	16.76
C	15,541	47.80	25	13,254	40.76
D	6,998	21.52	24	6,743	20.74
E	2,126	6.54	23	2,503	7.70
F	623	1.91	22	2,187	6.73
Total	32,515	100.00		32,515	100.00

The Statistical Department of the Junta Nacional del Algodon has stated that cotton acreage and production reports for the 1938-39 crop season will appear on the undermentioned dates, as follows :—

January 5, 1939 : Acreage estimate for the 1938-39 crop.

March 8, 1939 : First Report on Production for the 1938-39 crop.

May 5, 1939 : Second Report on Production for the 1938-39 crop.

July 7, 1939 : Third Report on Production for the 1938-39 crop.

September 8, 1939 : Preliminary Final Report on Production for the 1938-39 crop.

December 7, 1939 : Final Report for Acreage picked and Production for the 1938-39 crop.

BRAZIL

According to the Sao Paulo Department of Agriculture the total quantity of cotton of the Sao Paulo crop, classified by the Bolsa de Mercadorias during the Sao Paulo cotton crop season of 1938-39, was 1,391,497 bales of a weight of 248,295,586 kilos.

The following tabulation shows the classification of this crop by grades as compared with the crop of 1937 :—

Types	No. of Bales		Kilos		Per Cent. of Total	
	1937	1938	1937	1938	1937	1938
1	—	—	—	—	—	—
2	944	2,821	177,663	494,620	0.08	0.11
3	30,390	98,329	5,348,313	17,427,610	2.64	7.09
4	160,456	346,966	28,433,656	61,824,461	14.04	24.90
5	345,559	492,605	61,291,479	89,138,334	30.25	35.54
6	329,337	295,508	58,250,563	52,749,957	28.75	21.24
7	197,382	129,346	34,623,339	23,064,610	17.09	9.29
8	64,609	20,388	11,217,001	3,636,625	5.54	1.47
9	13,788	3,107	2,371,671	547,085	1.17	0.29
Inf. a 9	5,078	2,427	877,107	412,284	0.44	0.17
Total	1,147,593	1,391,497	202,590,792	248,295,586	100.00	100.00

The Sao Paulo Federal Government recently adopted a law to become effective as from March 1 last, by which ginneries are compelled to cover cotton bales with new cotton covering. No second-hand cotton covering is to be permitted. The cotton cloth to be used for bales, produced by presses of 50 cms. width or less, must be covered with cotton cloth 80 cms. wide with a weight per linear metre of 90 grammes. For bales produced on presses wider than 50 cms. a cotton cloth 90 cms. wide and weighing 100 grammes per linear metre is to be used.

Infringements of this new law are punishable by fines varying between 500\$000 and 2,000\$000.

The harvesting of the new Sao Paulo cotton crop will begin late in March. Impartial observers predict a crop of 250,000 long tons. Apprehension is felt over the trend of prices owing to the European situation. It is reported that the Japanese Government has authorised a minimum importation of 90,000 bales of Brazilian cotton this year.

(U.S. Department of Commerce)

According to the *Textile Weekly*, of Manchester, the Polish textile industry is reported to be considering the establishment of its own cotton plantations in Brazil. Preliminary investigations have indicated the Sao Paulo district as being the most suitable, as labour would be on the spot in the form of Polish immigrants. There are still difficulties, chiefly of a financial nature, which it is hoped can be disposed of.

BRITISH WEST INDIES

The planting season differs in the various islands, some islands planting in August-September and others in March. In the former the period of growth is spread over from one calendar year to another (1937-38), whereas in the latter the period of growth falls within a single calendar year (1938). The climatic conditions of the two distinct periods and their influence on the crop may therefore be widely different. In these notes, for which we are indebted to the West Indian Sea Island Cotton Association, the figures relating to acreage and production cover both periods.

The area planted in Sea Island cotton in 1937-38 amounted to 15,887 acres, being 1,163 less than the acreage estimated by the Association for that season and 882 acres more than the previous season. The increased acreage was planted in Antigua and Nevis.

The total production of Sea Island cotton lint amounted to 2,200,200 lb., equivalent to 5,501 bales of 400 lb. each. This quantity was 1,407 bales more than the total production of the previous year. The increase was due to a record crop in St. Vincent (690,935 lb. lint) and to increased

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production in Antigua, Nevis and St. Kitts. In general the Islands which planted cotton in the latter part of 1937 experienced a good cotton season.

Production of Marie Galante cotton lint amounted to 288,249 lb., equivalent to 695 bales of 400 lb. each, an increase of about 20 per cent. on the crop of the previous year.

ESTIMATED ACREAGE AND PRODUCTION, 1938-39

Island	Acres	Production		
		Lint lb.	Bales of 400 lb.	lb. per acre
SEA ISLAND				
Anguilla	400	32,000	80	80
Antigua	2,000	200,000	500	100
Barbados	25	2,500	6	100
Montserrat	4,500	675,000	169	150
Nevis	2,500	250,000	625	100
St. Kitts	1,000	200,000	500	200
St. Vincent	5,000	400,000	1,000	80
Virgin Islands (British)	225	16,875	42	75
Total	15,650	1,776,375	2,922	—
MARIE GALANTE.				
Grenada	5,250	240,000	600	46
St. Vincent	700	50,000	125	71
Total	5,950	290,000	725	—

Average prices obtained during the year were slightly less than during the previous year. Prices for the Montserrat strain ranged from 1s. 4d. to 1s. 8d. per lb., whereas for the superfine St. Vincent strain the range was higher at 1s. 8d. to 2s. per lb.

The Cotton Pests Entomologist completed the second year of his investigations during the period under review, and it is anticipated that the strict application of his recommendations will lead to marked reduction in the incidence of cotton pests.

(West India Committee Circular)

BULGARIA

The rapid development of cotton growing in Bulgaria is indicated by the increase in acreage from only 1,900 hectares in 1920 to 8,000 in 1932, and to 57,400 in 1938. Recently the Ministry of Agriculture announced plans to increase the area under cotton to about 72,000 hectares (of about 2.47 acres) in the current year. If the 1939 plan is fulfilled, the output of raw cotton may reach approximately 12,000 to 15,000 metric tons (of 4.6 bales of 478 lbs. each). The total consumption of the country approximates 20,000 tons. Nevertheless, in view of the development of the local cotton textile and spinning industry, imports of raw cotton have steadily increased from 3,758 tons in 1932 to 8,275 in 1936 and to approximately 9,000 in 1937. Of the latter total, about 1,000 tons were imported directly from India and Egypt. The remainder is mainly of

American origin, imported through various countries, Germany's share being some 6,000 tons, while direct importations from the United States amounted to about 1,000 tons.

(Textile Raw Materials)

CHOSEN

The final official estimate of the 1938 cotton crop in Chosen is placed at 188,000 bales of 478 pounds, according to information received by the U.S. Department of Agriculture. The acreage is estimated at 577,000 acres, the highest on record. Despite the increase of 30,000 acres over the 1937 area, production shows a decrease of 19 per cent. from the 1937 record crop of 232,000 bales. This decrease is attributed to the low temperature and excessive rainfall during the growing season and also to the continued drought in the principal cotton areas during the maturing season.

The report states that the Chosen Government intends to increase the cotton planting in 1939 to 613,000 acres. Their goal last year was 1,000,000 acres by 1942 which now appears to be rather optimistic. It is further reported that a new 20-year plan is being formulated to increase the production to over 1 billion pounds of unginned cotton. In 1938, however, production of unginned cotton totalled only 278 million pounds.

CHOSEN : COTTON ACREAGE, PRODUCTION AND YIELD PER ACRE, 1934-1938

Season	Acreage			Production*			Yield per acre	
	Native 1,000 acres	Upland 1,000 acres	Total 1,000 acres	Native 1,000 bales	Upland 1,000 bales	Total 1,000 bales	Native lbs.	Upland lbs.
1934 ..	147	327	474	26	110	136	85	161
1935 .	152	362	514	34	155	189	107	205
1936 ..	158	402	560	37	82	119	112	98
1937 .	118	429	547	31	201	232	126	224
1938 ..	114	463	577	24	164	188	101	169

Compiled from Chosen official estimates.

* Bales of 478 lbs.

HAITI

One of the important cotton ginning plants located in St. Marc, Haiti, is reported recently to have been burned down and a new plant recently installed in Port-au-Prince by one of the important cotton dealers, is reported out of order. Because of these two plants not operating, a decrease in the amount of cotton available for shipment abroad has been felt and will continue to be noticed until necessary repairs have been made.

(Commerce Reports)

IRAN

Cotton exports from Iran during the twelve months ended June 21, 1937 (the latest period for which official data are available) totalled 18,105 metric tons or about 80,000 bales of 500 lbs. each. The value was reported as 86,762,000 rials. Iranian currency is pegged to the pound sterling and was maintained at the rate of about 80 rials to the £, or about \$0.06 per rial in the period under discussion.

Cotton production for 1937-1938 is estimated at around 40,000 metric tons (equivalent to about 185,000 bales of 428 lbs.), which is about 20,000 bales higher than the estimate for 1936-1937. These figures represent a rough approximation as no statistics are compiled on cotton production in Iran. The domestic consumption for 1937-1938 is estimated roughly at about 80,000 bales. The industry is said to have at present about 130,000 spindles.

(U.S. Department of Commerce)

ITALY

The Italian cotton crop for 1938 has been officially estimated at 43,800 bales of 478 lbs. compared with 19,500 bales produced last season.

Since 1935, Italy has been doubling production of cotton each successive year, with Sicily, the principal Province, accounting for about 90 per cent. of total production. It is interesting to note that during the period of the American Civil War, Italy produced approximately 92,000 bales of cotton annually on an area of around 215,000 acres; but, as soon as the South was able to produce and export cotton again under normal conditions, Italy's production declined.

ITALY: COTTON ACREAGE AND PRODUCTION, 1935-1938
(In bales of 478 lbs.)

Year	Area Acres	Production Bales
1935	9,200	3,700
1936	26,500	9,900
1937	54,100	19,500
1938	90,600	43,800

Italian imports of raw cotton in 1938 decreased 6 per cent. from the total imported the previous year but showed a 14 per cent. decrease compared with the five year average for 1931-1935. Although the 1938 production was more than double that of 1937, the increase in the domestic crop did not offset the decline in imports.

ITALY: IMPORTS OF COTTON BY COUNTRIES, 1934-1938
(Bales of 478 lbs. net)

Country	Year ended December 31					
	Average 1926-1930 Bales	1934 Bales	1935 Bales	1936 Bales	1937 Bales	1938 Bales
United States	737,755	531,826	400,783	339,049	453,302	438,849
British India	192,991	147,716	122,014	31,742	81,671	62,815
Egypt	89,117	155,173	134,201	63,752	137,998	121,539
Brazil	*	10,518	8,859	13,867	31,561	25,588
Turkey	†	1,591	429	1,722	12,295	42,074
Other Countries	22,686	17,497	19,693	17,557	50,740	33,573
Total	1,042,549	864,321	685,979	467,689	767,567	724,438

Per cent. supplied by		Per cent.	Per cent.	Per cent.	Per cent.	Per cent.
United States ..		70.8	61.5	58.4	72.5	59.1
						60.6

Compiled from Movimento Commerciale del Reguo d'Italia and Commercio Estereo.

* Preliminary. † Included in "other countries."

(Foreign Crops and Markets)

MEXICO

Land is being prepared for cotton in the Mexicali district with the probability that the acreage will equal that of 1938. Ejidal cotton in the Torreon district is estimated at 92,600 bales, or about 15,000 bales more than originally calculated. Total Laguna cotton production is now placed at 140,000 bales, or about 15,000 bales over the average for the past ten years. Cotton planting is now in progress in Matamoros with imported seed used almost exclusively.

(Commerce Reports)

PERU

Satisfactory weather conditions and the abundant water supply in both the northern and southern agricultural districts during the first quarter of the year have practically assured a good volume of cotton for this year and the quality should be manifest around the end of April. Floods in the Chincha Valley have caused some damage but nothing of a serious nature. It is estimated that 45 per cent. of the 1939 crop has been sold but there has been no movement of importance during the month and prices have remained at previous levels. Stocks of Peruvian cotton in Liverpool, however, were about 166,000 bales in February, 1939, as compared with 90,000 and 58,000 bales during the corresponding months of 1937 and 1938, reflecting the poor demand for all grade of Peruvian cotton.

(U.S. Department of Commerce)

PERUVIAN COTTON EXPORTS IN 1938

Exports of cotton from Peru declined from 356,076 bales (478 lb.) in 1937 to 306,666 bales in 1938, according to recent information received from trade sources. The drop in exports was largely the result of lower world prices and was attributed only in small part to the slight decline in production. Producers obtained loans and are holding their cotton for a more favourable price. Stocks on hand in ports, railway stations, gins and warehouses on December 31, 1938, totalled 65,105 bales, compared with 26,706 bales at the end of 1937.

Prices of Peruvian cotton have fallen even more than have world prices because of the poor quality of the 1937-38 crop. Picking was slow, and the cotton was damaged by long exposure to the sun and dust before being picked. Damage caused by excessive humidity and insects was also reported in some valleys. The same factors were responsible for the slight decrease in production.

PERU: Cotton acreage, production, exports, and domestic consumption, average 1925-26 to 1929-30, annual 1934-35 to 1937-38

Crop Year April-March Average	Acreage Acres	Pro- duction Bales*	Year	Exports Bales*	Domestic Con- sumption Bales*
1925-26 to 1929-30	304,302	245,705	Average 1926-30	223,277	17,371
Annual			Annual		
1934-35	366,986	341,962	1935	340,922	29,767
1935-36	400,519	392,839	1936	348,865	30,032
1936-37	409,025	385,653	1937	356,076	30,885
1937-38	387,999	†375,921	1938†	306,666	28,182

Compiled from official sources.

* Bales of 478 lbs. net.

† Preliminary; taken from current consular reports.

PERU: Exports of cotton by leading countries, average 1926-1930, annual 1935-1938

(In bales of 478 lbs. net)

Country	Average 1926-1930 Bales	1935 Bales	1936 Bales	1937 Bales	1938* Bales
United Kingdom ..	181,387	137,613	151,072	187,883	175,810
Germany ..	21,480	113,807	102,430	102,917	77,459
United States ..	17,558	1,223	763	550	†
Japan ..	‡ 1	38,119	53,365	11,929	5,524
Belgium ..	471	19,401	11,728	16,410	12,852
France ..	979	6,263	8,404	10,851	6,670
Netherlands ..	115	2,084	6,067	10,067	13,950
Other Countries ..	1,286	22,412	15,036	14,900	14,401
Total ..	223,277	340,922	348,865	356,076	306,666

Compiled from Anuario del Comercio Exterior del Peru.

* Preliminary. ‡ Included in other countries. † 4-year average.

Lower prices for Peruvian cotton, together with reduced exports, contributed to the downward trend in the value of Peruvian currency from 25.7 cents, United States currency, in January 1937, to a low point of 20.2 cents in December 1938. Cotton exports are an important factor both in creating foreign exchange and in providing governmental revenue through the cotton export tax. This tax amounts to 10 per cent. of the proceeds of cotton exports after the cost of transportation (about 3 cents per lb. to Liverpool) and the cost of production, as estimated by the Government (about 8 cents per lb. at current rate of exchange), have been subtracted. The present price of medium and low grades of cotton does not equal these costs and the export tax even on the better grades is negligible. The decline in the value of Peruvian currency, while increasing the prices of import items to domestic consumers, will materially benefit cotton producers by increasing the prices received for exported cotton. Since there are no alternative cash crops to which cotton planters can easily turn, it is expected that the present rate of production will continue.

(U.S. Dept. of Agriculture)

QUEENSLAND

The General Manager of the Queensland Cotton Board has recently issued his annual report for 1938 which makes very interesting reading. We extract the following from this instructive account of the progress of cotton cultivation in Queensland :—

The seasonal conditions experienced for this crop were most unfavourable, and were on a par with the conditions experienced in the preceding 1936-37 season.

The unfavourable seasonal and growing conditions, with the resultant low average yields of cotton, were most unfortunate in regard to the extension and progress of the cotton growing industry in Queensland. As a result of propaganda work carried out by the Queensland Cotton Board in conjunction with the Department of Agriculture and Stock to increase the acreage and production of cotton in Queensland to meet the requirements of the Australian market for raw cotton, the acreage planted for the season was increased to a very considerable extent over preceding crops, 66,000 acres being actually planted for the season by 3,657 growers. As a result of increased acreage a greater production of cotton was obtained—9,654 bales of raw cotton compared with 8,519 bales from 55,000 acres in 1937. The Queensland Cotton Growing Industry has, therefore, experienced in succession two most unfavourable seasons.

The effect of this is to dishearten cotton growers, but it must be realised that these recurring droughty meagre rainfall periods are a normal condition of Australia's climate, but that they are followed by periods of favourable seasonal conditions. It is the average of the good and bad seasons which have to be taken into account in arriving at the success or otherwise of cotton growing in Queensland.

ACREAGE AND PRODUCTION

Crop returns were received from 3,657 growers, indicating that 65,796 acres of cotton had been actually planted.

As these crop returns are received from the beginning of January onwards, and as a considerable part of the late planted scrub areas of cotton were later abandoned upon the advent of the serious dry heat wave during February, it is estimated that approximately only 60,000 acres of cotton were actually brought to the harvest stage.

Following are the records of production of cotton in Queensland since 1927 :—

Season	No. of Growers	Acreage Planted	Quantity Seed Cotton Lbs.	Lint Produced Lbs.	No. of Bales of Lint
1927	2,080	20,100	7,054,951	2,311,171	4,824
1928	2,400	24,970	12,221,598	4,110,602	8,268
1929	2,278	22,000	7,965,339	2,518,348	5,044
1930	2,241	32,781	17,006,460	5,599,400	11,051
1931	2,859	39,768	15,147,553	4,890,953	9,689
1932	3,816	61,304	6,171,254	1,990,138	3,989
1933	3,733	74,610	17,718,306	5,561,338	10,974
1934	3,202	49,283	26,861,635	8,769,510	17,471
1935	3,195	57,017	20,766,209	7,061,749	14,515
1936	3,364	62,514	19,198,600	6,653,973	13,504
1937	2,889	55,133	11,792,828	4,113,684	8,519
1938	3,657	65,796	13,687,872	4,773,936	9,654

The cotton picking award remains the same as during 1937 and 1938—that is, for the ordinary hand-picked 11s. 6d. per 100 lbs. of seed cotton ; for snapped cotton 5s. 6d. per 100 lbs., plus a sum of 4s. per week to be added to the picker's earnings under the above contract rates.

CLASSING OF THE QUEENSLAND COTTON CROP

The grading of the seed cotton and the classing of the raw cotton received and produced at the ginneries in Queensland was carried out by the Cotton Section Officers of the Department of Agriculture and Stock.

This important task has always been carried out by the Department of Agriculture and Stock's Cotton Classing Officers, and the classing of the cotton crop by an independent authority has proved very satisfactory indeed to all concerned—the Queensland Cotton Board, and the Australian spinners who purchase the cotton on the classification determined by the Department of Agriculture's Cotton Officers.

As the cotton is being ginned two samples are drawn from every bale as the press is being filled, and it is upon examination of these two samples representing each bale of raw cotton that the classification of that bale is determined. The samples representing each bale are then filed away for record purposes, and these samples are retained till the bale in question is sold and consumed by the purchaser in his mill.

Following the method adopted in the United States of America in regard to the classing of raw cotton, a system was inaugurated at the beginning of the 1938 season of a checking of the classification of each bale of raw cotton turned out ; that is, the classing carried out at the Glenmore Ginnery is checked by another classer at Brisbane, the samples representing the bales being forwarded to Brisbane for record purposes.

At Whinstanes the classing carried out at the ginnery by the classer is again checked by another classer on the staff of the Cotton Section of the Department of Agriculture and Stock.

The checking of the classification of every bale of raw cotton in Queensland by two independent cotton classers, therefore, is an additional safeguard that the classing of the Queensland cotton crop is carried out fairly and efficiently.

The cotton crop is classed according to the Universal Grade Standards and the Standards for Staple Length for American cotton. These Standards are prepared and issued by the United States Department of Agriculture, with the authority of an international conference representing all the cotton merchant and manufacturing associations handling American cotton.

Following is a schedule showing the classification of the whole of the production of raw cotton for the 1938 season :—

CLASSING OF RAW COTTON PRODUCED FOR 1938.

Grade	Staple Inches	White Cotton Bales	Light Spotted Cotton Bales	Heavy Spotted Cotton Bales	White Wasty Cotton Bales	Yellow Spotted Cotton Bales
Strict Good Middling ..	1 $\frac{1}{8}$ in.	1	3	—	—	—
	1 $\frac{7}{16}$ "	7	7	—	—	—
	1 "	21	10	—	—	—
Good Middling ..	1 $\frac{1}{8}$ "	—	8	—	—	—
	1 $\frac{3}{8}$ "	2	—	—	—	—
	1 $\frac{1}{2}$ "	15	20	—	1	—
	1 $\frac{5}{8}$ "	180	164	—	3	—
	1 "	350	459	13	—	3
Strict Middling ..	1 $\frac{3}{8}$ "	137	212	10	—	—
	1 $\frac{1}{2}$ "	6	14	4	—	—
	1 $\frac{5}{8}$ "	14	11	—	—	—
	1 $\frac{3}{4}$ "	169	166	1	16	—
	1 "	373	806	56	26	47
Middling ..	1 $\frac{1}{8}$ "	149	376	18	6	19
	1 $\frac{1}{4}$ "	6	53	13	—	2
	1 $\frac{3}{8}$ "	45	49	1	24	2
	1 "	521	965	17	8	62
	1 $\frac{1}{2}$ "	183	629	14	—	49
Strict Low Middling ..	1 $\frac{3}{4}$ "	1	43	4	—	2
	1 "	227	133	—	—	5
	1 $\frac{1}{8}$ "	78	395	—	—	100
Low Middling ..	1 $\frac{1}{4}$ "	2	71	—	—	183
	1 "	10	10	—	—	—
	1 $\frac{3}{8}$ "	57	526	—	—	166
Strict Good Ordinary .	1 $\frac{1}{2}$ "	3	468	—	—	522
	1 $\frac{3}{4}$ "	10	—	—	—	—
Good Ordinary ..	1 "	91	—	—	—	—
	1 $\frac{1}{8}$ "	1	—	—	—	—
TOTALS ..		2,659	5,598	151	84	1,162

RECEIVALS OF SEED COTTON AT THE GINNTRIES

The receipt of seed cotton at the ginneries followed the usual routine that has been established since 1935.

Immediately upon the bale of seed cotton being unloaded from the railway wagon it is graded by the Department of Agriculture's officer and a tag indicating the grade and staple length of the seed cotton is attached to the bale by the cotton grader.

The bale of seed cotton is then carefully weighed on a platform scale. This scale has a large dial face on which the reading is indicated clearly in lbs. The weighing is carried out by a weigh clerk, who records in a book all the details relative to the particular consignment, and the reading on the scale is then checked by a check weigher. Both these officers are always present upon the weighing of any bale or bag of seed cotton received at the ginnery, and the most careful attention is paid to this very important operation covering the weighing and receipt of seed cotton from growers.

The bale of seed cotton is then segregated in the cotton shed according to the grade and staple length and the variety of the cotton. The bales of seed cotton of each variety and of similar grade and staple are then ginned together. Seed cotton of different varieties or different grades is never mixed together in the ginning operation.

This segregation of the seed cotton according to varieties and grades is very essential, as from the records of receivals of seed cotton and the records of the production of raw cotton after ginning the actual lint percentage of the seed cotton of each variety is accurately determined, and it is upon this actual lint percentage that the grower is paid for the amount of raw cotton contained in his seed cotton as received at the ginnery.

PAYMENTS TO COTTON GROWERS

Immediately upon receipt of a consignment of seed cotton at the gin-
nery a first advance payment is made to the grower.

This first advance payment is composed of a payment for the amount of raw cotton lint contained in the seed cotton according to the grade and staple length of the cotton, a payment for the cotton seed contained in the seed cotton at a rate of £4 per ton, and the amount of the Commonwealth Bounty due to the grower calculated on the amount of raw cotton lint contained in his seed cotton.

The Cotton Board has always realised the importance of making as large a first advance payment to growers as possible, and during the past four years this first advance payment has been increased and for 1938 represented 76 per cent. of the total payment to be received by cotton growers for their cotton.

As the season proceeds and the raw cotton is sold to cotton spinners in Australia subsequent payments are made to cotton growers. The second advance payment is made in July on all cotton received up to June 30. A third advance payment is made in November after the season has terminated, and the payments made up to and including this third advance payment usually represent from 90 per cent. to 95 per cent. of the total payment which will be received by growers for their cotton. A fourth payment is made in March of the following year, and the final payment about the end of June after the whole of the raw cotton has been marketed and delivered to Australian purchasers.

NETT PAYMENTS MADE TO COTTON GROWERS FOR RAW COTTON (LINT) AND SEED COTTON DELIVERED ON RAILS 1934 to 1938

	1934 Raw Cotton	1935 Raw Cotton	1936 Raw Cotton	1937 Raw Cotton	1938 Raw Cotton
	Pence per lb.				
1st Advance Payment made on receivals of cotton at ginnery ..	6-950	8-024	7-612	8-366	8-639
Subsequent payments made... ..	3-376	4-584	3-783	3-008	2-691 (est)
Total Payment per lb. Raw Cotton ..	10-326	12-608	11-395	11-374	11-330 (est)
Total Payment per lb. Seed Cotton ..	3-372	4-287	3-949	3-966	3-952 (est)

RESTORATION OF THE EMERGENCY BOUNTY CUT

As shown in the Annual Report for 1937, the world price of raw cotton fell to an extremely low level during the latter part of 1937, the price in Liverpool falling from about 8d. per lb. in March down to approximately 4.50d. per lb. in November of that year.

This sudden and disastrous decline in the price of cotton created a serious position for cotton growers in Queensland, with the prospect of unremunerative returns for 1938.

A case was therefore presented to the Commonwealth Government for the restoration of the 20 per cent. Emergency Cut in bounty payments which had always been in force ever since the Raw Cotton Bounty Act came into operation at the beginning of 1935, and on February 7, 1938, the Government announced the restoration of this 20 per cent. Emergency Cut in bounty payments.

This action was of very material benefit to the cotton growing industry in Queensland for the present season, and in effect it means that this increased bounty payment to growers, which continues on for 1939, has just compensated cotton growers for the drastic fall in world prices of raw cotton, so that the nett return to be paid for 1938 will be practically the same as for 1937.

COTTON PRODUCTION IN QUEENSLAND

During the past five years the production of cotton in Queensland has been changed over from a long staple type to a short to medium staple type of raw cotton. This has been done to meet the requirements of the Australian market.

Just what the requirements of the Australian market for raw cotton will be in five or ten years time is most difficult to estimate, but a reasonable forecast can be given, based on the types of yarn and cotton goods which are being made at the present time and which are likely to be made following the expansion of the cotton spinning industry.

This matter is one of considerable importance to the cotton growing industry in Queensland as the growing programme, which cannot be changed easily or quickly, must be based on the requirements of the Australian market and the demand for raw cotton types and qualities met as far as it is profitable and practicable to do so.

If an estimated production of raw cotton in Queensland is taken at the level of 18,000 bales, it will be found that from this crop there would be available about 15,000 bales of usable raw cotton. By the term "usable" raw cotton is meant the qualities of cotton falling within the mature and light spotted grades which are acceptable to the Australian spinners and suitable for the manufacture of the types of yarns generally being manufactured by them.

The balance of the crop, classed as non-usable, totalling about 3,000 bales, would comprise the Yellow Spotted and immature grades of raw cotton, and also the low grades produced from the snapped cotton which is harvested towards the latter part of the season in Queensland.

Taking the 15,000 bales of usable raw cotton, as the basis, the number of bales of each staple length which would be required to meet the average requirements of Australian spinners at the present time would be as follows :—

BALES OF RAW COTTON OF EACH STAPLE LENGTH REQUIRED BY AUSTRALIAN SPINNERS BASED ON THE PRODUCTION OF 15,000 BALES OF MATURE AND LIGHT SPOTTED RAW COTTON

Staple Length	Bales (500 lbs.)
1 $\frac{1}{8}$ in. to 1 $\frac{3}{8}$ in.	500
1 $\frac{3}{8}$ in.	2,000
1 in.	7,000
1 $\frac{1}{8}$ in.	5,000
1 $\frac{3}{8}$ in.	500
TOTAL	15,000 bales

At the present time, with Australian spinners consuming an amount of approximately 25,000 bales of usable cotton, about 10,000 bales of a $\frac{1}{4}$ -in. staple or under are used by spinners in Australia, this raw cotton all being imported from India.

According to the latest news from Australia the establishment of a cotton spinning mill in Queensland might take place soon. Sir Leslie Wilson, the Governor, is credited with having made this statement after having visited a cotton spinning mill in Melbourne. Confirmation of the Governor's belief was expressed by the manager of the Queensland Cotton Board (Mr. J. D. Young), who said that when he was in Melbourne recently he had discussed the possibilities with Mr. M. T. D. Davies, chairman of Davies, Coop & Co. This was the largest firm of cotton spinners in Australia, and last September it had placed before the Tariff Board a request for duties to be placed on certain cotton imports. If the report was favourable the firm would probably establish a mill in Queensland without delay.

Queensland is the only cotton growing State. The industry was launched there in 1928, and there are now between 3,000 and 4,000 cotton farmers. They employ 3,000 seasonal workers in the harvesting period, which begins in March and extends into July. This year the output is estimated at 14,000 bales of raw cotton lint, each bale containing 500 lb. The net return to the growers should be about £350,000. Although this makes the average return appear small, the explanation is that many grow only small areas of 10 acres or so as a side line. The return for the larger growers would be substantial. The possibilities for an expansion of the Queensland cotton industry were limitless, said Mr. Young. For instance, if the yarn for cording rubber tyres could be kept out, or have a high enough duty placed on it, this manufacturing industry alone would require 20,000 bales of raw cotton a year, or 6,000 bales more than the total Queensland output this year. In any case, the industry was ripe for marked expansion. Not nearly enough cotton was being grown for local requirements, and in view of the unsettled world conditions Australia must become self-supporting.

(*Manchester Guardian*)

ST. VINCENT

Weather conditions in January were rather unfavourable for the cotton crop and peasants' fields in particular suffered. It was feared that any further rainy weather might cause serious losses from boll rotting and shedding, and expectations were for a crop much below that of 1937-38 which was obtained from a rather smaller acreage than that planted in 1938-39.

(*International Institute of Agriculture*)

SUDAN

The following Cotton Progress Report for March, 1939, season 1938-39, has been issued by the Sudan Government, Agriculture and Forests Department, Khartoum.

It must be understood that these figures are only roughly approximate at this stage of the cotton season.

	Estimated Total Yield (Bales of approx. 400 lbs. Lint)		Picked to date		Area under Crop (Feddans)
	1938-39	1937-38	1938-39	1937-38	1938-39
	March	June	March	March	March
SAKELLARIDIS IRRIGATED :					
Gezira :—					
S.P.S. Ltd. ..	220,000	190,572	166,439	172,956	167,066
K.C.C. Ltd. ..		46,172	36,725	38,926	38,255
Abdel Magid ..		5,125	4,250	2,340	4,515
Gondal	462	493	450	442	390
White Nile :—					
Dueim	375	565	308	513	500
Private Estates ..	7,520	10,185	6,706	9,193	9,515
Tokar	20,000	7,029	8,579	3,041	40,000
Kassala	15,750	15,633	8,925	9,027	33,292
Total Sakellaridis Irrigated	269,232	273,254	232,382	236,438	293,533
AMERICAN IRRIGATED :					
Northern Province :—					
Dongola (Govern- ment Estates) ..	2,334	2,141	2,206	2,127	2,061
Berber (Government Estates)	*2,375	3,078	2,375	3,078	2,018
Zeidab S.P.S. ..	*5,217	5,243	5,217	5,243	5,554
Other Private Estates	*551	1,621	551	1,534	600
Sagias	125	—	15	—	200
Khartoum—					
(Private Estates) ..	*21	—	21	—	73
Total American Irrigated	10,623	12,083	10,385	11,982	10,506
AMERICAN RAIN GROWN :					
Kordofan	25,505	28,967	25,287	28,562	115,000
Upper Nile	950	722	847	722	6,000
Equatoria	*2,635	3,146	2,635	2,921	16,260
Total American Rain Grown	29,090	32,835	28,769	32,205	137,260
Total All Varieties ..	308,945	318,172	271,536	280,625	441,299

* Final.

The area under crop planted in the 1937-38 season amounted to 426,818 Feddans.

SYRIA

Some 36,862 hectares of land were planted with cotton in Syria in the spring of 1938 as against 34,500 hectares in 1937 (not including the Sandjak of Alexandretta). This figure may be divided between various districts in the following manner :—

Aleppo and District	31,000 hectares
Hama-Selemieh	1,270 "
Homs	32 "
Euphrates	520 "
Djezireh	40 "
Lattaqia	4,000 "

The sum total of all the Syrian crop realised about 87,000 quintals of ginned cotton. The crop was very satisfactory from the point of view of quantity and about average with regard to quality. The prices obtained by the merchants for this cotton vary between 12 and 14 piastres per kilo of seed cotton, and are scarcely found to be remunerative.

(*Association Cotonnière Coloniale*)

UGANDA

The condition of the Uganda cotton crop at the end of November warranted an estimate of approximately 272,000 bales of 478 lb. This forecast is smaller than the record crop of approximately 349,000 bales produced in 1937-38. The decrease in this season's estimate is partly the result of dry weather, which affected late plantings, and partly of increased damage from insects. Production and acreage have steadily increased. The million-acre mark was reached for the first time in 1932-33, and the peak to date for both acreage and production occurred last season when 1,759,157 acres were planted. All Uganda cotton is exported, principally to India, with smaller quantities going to the United Kingdom and Japan.

UGANDA : Cotton acreage and production, 1933-34 to 1938-39
(In bales of 478 lbs.)

Year	Acreage Acres	Production Bales
Average 1925-26 to 1929-30 ..	615,156	131,256
1933-34	1,090,502	239,031
1934-35	1,185,599	211,918
1935-36	1,365,529	268,910
1936-37	1,484,829	283,172
1937-38	1,759,157	349,038
1938-39	*1,493,477	†272,000

Compiled from annual reports and official crop reports of the Uganda Department of Agriculture.

* Acres planted to the end of October.

† First estimate.

(*U.S. Dept. of Agriculture*)

Owing to the early advent of the dry season in the Eastern and Northern Provinces, the later plantings have been adversely affected, but the early plantings promise average yields. Picking has begun in most districts and quality is satisfactory.

In Buganda and the Western Provinces, and in Bunyoro District of the Northern Province, weather conditions were in general favourable, and crop prospects were maintained during November.

The condition of the crop at the end of November would appear to warrant an estimate of approximately 325,000 bales. It will be realised, however, that weather conditions from the end of November onwards may necessitate a revision of this figure.

(Cotton)

U.S.S.R.

Raw cotton supplies from the large crops harvested in recent years by far exceeded the quantities which the Soviet industry was able to absorb. Since exports of raw cotton were less than imports, a considerable reserve has accumulated, and there is a probability that these stocks will continue to rise in the current campaign. The 1938 manufacturing plan was indicated to require only a total of over 2,767,000 bales of 487 lb. of ginned cotton (and actually less because the plan was not fully executed), compared with a reported harvest of 3,780,000 bales in 1937. Carry-over stocks at the beginning of the 1938-39 season are reported to have surpassed 1,380,000 bales of ginned cotton, compared with carry-overs of 876,000 and 217,000 bales in the previous two seasons.

Low grade cotton is reported to constitute a considerable share in the total carry-over. It amounted to 37 per cent. of the total in 1937 and is estimated to make up about half of this season's carry-over stocks, which, in absolute quantity, means the doubling of last year's stocks of low grades. This is partly due to the relatively unfavourable qualitative outturn of the 1937 crop.

The actual carry-overs in the past several years were even larger than the above figures indicate, since the available data on crop production, foreign trade, yarn output by the industry and estimates of "other consumption" of raw cotton do not account for a disappearance equal to reported seasonal supplies less reported end of season carry-overs. An over estimation of crop production in recent years is, of course, also possible.

(U.S. Dept. of Commerce)

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FINAL GINNING REPORT, 1938-39

The final ginning report issued March 20 by the Census Bureau shows that the total amount of last season's American cotton crop ginned to March 1, is estimated at 11,621,000 running bales, which compares with 18,252,000 bales and 12,141,000 bales for the two previous seasons. The amount ginned since the last report, which was made up on January 16, is 63,000 bales, against 608,000 bales in the same period last year and 185,000 bales two years ago. The cotton included in the total but not yet ginned is estimated at 7,000 bales, against 59,000 bales estimated as unginned after the March canvass last year. The total includes 158,000 round bales, 4,000 bales of Sea Island, and 21,000 bales of American-Egyptian, against 326,000 round bales, 4,000 bales of Sea Island, and 11,000 bales of American-Egyptian shown in the corresponding report last year. The average gross weight of bales is estimated at 513.8 lb. against 519 lb. last year and the total ginnings in equivalent 500 lb. bales 11,942,000 bales, against 18,945,000 bales for the previous crop.

The following table gives details of ginnings with comparisons:—

	1939	1938	1937
Alabama	1,064,000	1,566,602	1,135,027
Arizona	192,000	310,199	187,771
Arkansas	1,301,000	1,808,840	1,265,622
California	414,000	723,035	436,322
Florida	22,000	35,363	27,654
Georgia	851,000	1,474,984	1,086,458
Kentucky	12,000	15,409	10,445
Louisiana	652,000	1,050,629	742,565
Mississippi	1,636,000	2,561,778	1,862,515
Missouri	329,000	390,219	301,267
New Mexico	92,000	153,812	104,999
North Carolina	399,000	780,594	606,681
Oklahoma	545,000	756,419	289,740
South Carolina	642,000	996,175	804,232
Tennessee	473,000	633,335	422,197
Texas	2,964,000	4,952,378	2,825,420
Virginia	11,000	40,215	30,543
Other States	2,000	3,089	1,918
Total	11,621,000	18,252,075	12,141,376

COST OF COTTON PRODUCTION IN 1937

The Department of Agriculture estimates the cost of producing cotton in 1937 with seed credited as a by-product averaged 9.6 cents per lb. of lint including rent, and 7.8 cents per lb. excluding rent. The 1937 average yield of 279 lbs. of lint (gross weight) compares with the 1927-36 average of 188 lbs. per acre harvested. It is estimated that the cost in 1937 on the basis of average yields would have been 12.4 cents per lb. The highest cost per lb. of lint is indicated for the western hilly areas and the lowest cost for the river bottom areas. Cotton costs per unit of product, when computed on an average yield basis, vary less in different areas than do costs for other crops.

State and Region	NET COST OF LINT PER POUND					
	(b) Average Yield Lint per Acre lbs.	PER ACRE		Exclud- ing Rent 1937 Yield Cents	PER POUND	
		Exclud- ing Rent \$	Includ- ing Rent \$		Including Rent 1937 Yield Cents	1927-36 Yield Basis (c) Cents
North Carolina	354	30.05	36.96	8.5	10.4	12.1
South Carolina	302	24.94	29.29	8.3	9.7	11.4
Georgia	282	23.87	27.30	8.5	9.7	11.9
Alabama	303	23.72	27.70	7.8	9.1	12.1
Tennessee	334	24.83	30.03	7.4	9.0	11.3
Mississippi	388	27.80	33.47	7.2	8.6	12.0
Louisiana	352	24.80	29.83	7.0	8.5	11.7
Arkansas	311	23.44	28.19	7.5	9.1	11.8
Oklahoma	163	15.38	19.15	9.4	11.7	13.2
Texas	206	16.03	20.61	7.8	10.0	12.7
Region						
Coastal Plain	301	25.36	29.48	8.4	9.8	12.6
Piedmont	285	24.98	29.49	8.8	10.3	12.0
Eastern Hilly Areas ..	341	24.78	29.37	7.3	8.6	11.3
River Bottom Areas ..	443	28.63	35.15	6.5	7.9	10.5
Western Hilly Areas ..	208	19.54	23.51	9.4	11.3	14.0
Gulf Coast Prairie and Texas						
Black Prairie	187	15.66	21.03	8.4	11.2	12.8
Western Dry Areas ..	218	14.78	18.60	6.8	8.5	11.3
Irrigated Areas	561	44.22	56.06	7.9	10.0	11.7
U.S.	279	21.85	26.73	7.8	9.6	12.4

(a) Preliminary estimates. In computing averages, data were weighted by acreage harvested. (b) Obtained by dividing the production of lint in terms of 500-lb. gross weight bales by the acreage harvested. (c) Estimated cost in 1937 if cotton yield and acreage abandonment had been the average of 1927-36. The average U.S. yield in that period was 188 lbs. of lint (gross weight).

UNIVERSAL STANDARDS

The Universal Cotton Standards Committee met in Washington on March 13 to 16. Besides America, representatives from the following countries took part: Belgium, England, France, Germany, Holland, Italy and Japan. Spain was represented through the representative from Liverpool, and Poland was represented by the member for France.

The delegates were received in Washington by Secretary Wallace and the Assistant Secretary of Agriculture, Mr. H. L. Brown, and were shown over the new building known as the Agricultural Annex, in which all cotton work is now undertaken.

Besides passing and agreeing upon the various grade samples to be officially designated as the Universal Cotton Standards during the next three years, the delegates were informed by Mr. Brown that the one-variety cotton community plan sponsored by the U.S. Department of Agriculture had produced only 4,000 bales of the 1938 crop, but so far information to hand from cotton spinners, who had received these cotton reports, stated that the spinners were eminently satisfied with the appearance of the bales upon receipt at the mill. It should be mentioned that this cotton was produced in eight communities of the U.S. Cotton Belt and was known to be of dependable quality. The Department had an official at each of the gins where this cotton was ginned in order to supervise its ginning, to see that it was not ginned wet or even damp and to see that the gins were not running too rapidly. The cotton was purchased for the account of the American Cotton Co-operative Association and for the account of Messrs. Anderson, Clayton & Co., who exported the cotton in the usual way. Samples were taken at the gin, which obviated the necessity of cutting the bagging and the bales were re-compressed in the usual way after inspection by representatives of the Department, to see that they were completely covered with the cotton covering and that the ends and sides were sewn up. Mr. Brown stated that it was probable that for the 1939 crop, 30,000 to 40,000 of such one-variety cotton bales would be produced under the Department's supervision.

It was decided that the Gdynia Cotton Association should be represented at the next meeting of the Universal Cotton Standards Committee, which would take place in three years' time.

PROPOSED SUBSIDY FOR U.S. COTTON EXPORTS

Of the many and varied measures promoted recently by U.S. politicians for the purpose of improving the U.S. cotton export situation, the one most in the public eye at the moment is that favoured by President Roosevelt relating to an export subsidy scheme.

Advices from Washington dated April 22, state that President Roosevelt has agreed to a cotton export proposal providing for the payment of a subsidy of about 2 cents per pound on up to 7,000,000 bales of this year's cotton crop.

The subsidy would be paid by the Secretary of Agriculture during the period of twelve months beginning August 1, 1939. Exporters could take payments either in cash or in cotton from the loan stocks. Loan cotton received as payment could not be disposed of until after January 1, 1940.

The proposal, which is supported by all but two members of the Southern cotton block in the Senate, will be attached to the Agricultural Appropriations Bill now pending Congress, according to Senator Bankhead.

Commenting upon the President's export subsidy plan, the Washington Correspondent of the *Textile World* (New York) states as follows :—

It is apparent that the President has decided to recapture this country's normal share of export business. The normal share of each market is to be determined by an average governing representative years. The President believes that this can be done during the next twelve months at a cost of from \$60,000,000 to \$90,000,000. From now until August 1 the expenditure will not exceed \$15,000,000, the President estimates. If producers must be paid to keep their cotton out of the loan, the cost would not be less than \$120,000,000, while some estimates run much higher.

In announcing the plan the President gave assurances that mill inventories would be protected. He announced his intention of employing Section 22 of the original crop control act to establish import quotas that would protect both the grower and the manufacturer of cotton. He also made it clear that payments would be made on exports of manufactured goods sufficient to correct any disadvantage that American mills might have in world markets.

Opposition to an export subsidy for cotton continues, but indications are that Congress will approve the programme in much the same form as outlined by the President. The chief objection heard in the halls of Congress is that cheap cotton is made available to foreign consumers at the expense of the American taxpayer. It is pointed out that other producing countries can pay export subsidies, and that a trade war will be necessary to dispose of the 8,000,000 bales by which the President would reduce the present carryover.

REPERCUSSIONS OF PROPOSED U.S. COTTON EXPORT SUBSIDY IN INDIA

At a meeting of the Indian Central Cotton Committee held on March 31 last, under the chairmanship of the President, Sir Bryce Burt, the Committee, after hearing a report that the United States proposed granting an export bounty on American cotton, adopted the following resolution :—

" In view of the news received recently to the effect that U.S.A. intend granting an export subsidy for American cotton to the extent of 1.25 to 2 cents per lb. of cotton exported from the U.S.A., this committee recommends that the Indian Central Cotton Committee should consider without delay the necessity of the indigenous cotton market being preserved for Indian cotton by urging the Government of India to adequately raise import duties on subsidised cotton, cotton cloth and yarn in such effective manner as will prevent cloth and yarn made out of bounty-fed American cotton from replacing manufactures of Indian cotton, and to take such other effective steps in consultation with the Indian Central Cotton Committee as may appear feasible."

LOAN COTTON AND THE PROPOSED EXPORT SUBSIDY

The following is extracted from a recent report of the *New York Cotton Exchange Service* :—

There are now about 11,400,000 bales of cotton in the Government loan stock, consisting of about 1,700,000 bales of 1934 cotton, 5,300,000 bales of 1937 cotton, and 4,400,000 bales of 1938 cotton. Growers may continue to put 1938 cotton under Government loan under April 30, and small additional amounts are entering the loan stock from week to week, but the loan stock is not likely to be increased substantially from the present level. The average repossession price on 1934 loan cotton, i.e., loan principal plus accumulated charges and plus a small profit to the repossessing growers, is about 15½ cents a pound. In 1934 the Government loaned a flat rate on all qualities of cotton of seven-eighths inch and longer staple, and so the repossession price is approximately the same on practically all 1934 loan cotton. The average repossession price on 1937 loan cotton of middling seven-eighths inch quality and better is probably about 10½ cents. The average repossession price on 1938 loan cotton of middling seven-eighths inch quality is probably about 9 cents. Since the Government has made loans at the same rates in all parts of the belt, in all of its loan programmes, repossession prices are the same on loan cotton in all locations. At the present time, the market value of basis middling seven-eighths inch cotton at first hand in the South ranges from about 7.80 cents at points in the north-western section of the belt which are farthest from the ports to about 8.80 cents in the south-eastern section of the belt where the southern mills are located. Hence, market values are considerably below repossession values even on 1938 loan cotton, and they are far below repossession values on 1937 and 1934 loan cotton.

The loan provision of the present farm law provides that under certain conditions the Government must make loans to growers, and such loans must be in the range from 52 per cent. to 75 per cent. of the parity price for cotton as of August 1. At this writing 52 per cent. of the parity price is 8.11 cents, and 75 per cent. of it is 11.70 cents. The proposal of an export subsidy and loan programme, designed to establish a relatively high domestic price and a relatively low foreign price for American cotton, has led to the thought that such plan may contemplate a loan rate above the minimum level of 52 per cent. of parity, i.e., higher than 8 11 cents a pound. However, it has been observed in the trade that if a high loan rate were established the result would be that old loan cotton, obtainable at repossession price levels, would be available at lower prices than new crop cotton, unless the repossession of old loan cotton at such levels was prevented. If that situation were to prevail, old crop loan cotton would flow out of the Government loan stock, but new crop cotton would flow into the stock. On the other hand, it has been observed in the trade that if an export subsidy is established, and if it is applicable to loan cotton without limit, loan cotton would presumably flow out of the loan stock into export channels whenever foreign markets would take it at the repossession level less the subsidy. Such an arrangement would, presumably, prevent the foreign markets from rising above a level equal to the lowest repossession value of loan cotton minus the export subsidy, with due allowance for transportation costs on export shipments.

The effects of an export subsidy and loan programme would obviously depend in large degree on the terms of the programme, and no announcement has yet been made as to the terms of the programme that has been under consideration. According to economic theory, if all demand factors in foreign countries were unchanged and if foreign production were unchanged, a large increase in exports by this country under a subsidy arrangement would force down the foreign price of all growths of cotton. If the subsidy arrangement were such that an unlimited amount of old crop cotton would flow out of the loan stock into export channels, in addition to new crop cotton available for export, at some particular foreign price level, that price level would, presumably, constitute a " roof " over foreign markets. If, on the other hand, the arrangement were such that only a limited amount of old crop loan cotton was allowed to flow into foreign markets under a subsidy, in addition to new crop cotton available for export, and if, say, the amount of loan cotton so moved abroad were limited to 1,000,000 bales per year, it would take over 11 years to dispose of the present loan stock. The cost of carrying the present

loan stock is about \$45,000,000 per year. The total carrying cost over 11 years, assuming a gradual liquidation of the stock over that period, would be about \$250,000,000. At 8 cents a pound, the loan stock of 11,400,000 bales has a value of about \$456,000,000.

SECRETARY WALLACE DISCUSSES LOAN STOCKS

Secretary of Agriculture Wallace told the House Agriculture Committee recently that the cotton industry will be making a serious mistake if it attempts to go through the year denying foreign buyers access to American cotton by keeping stocks "dammed up" behind the loan programme.

Testifying on the farm situation generally and restoration of agricultural purchasing power to levels of 1929, the Secretary indicated that unless something is done soon to release some of the loan stocks a further loss of export markets may be expected.

He said Congress can never solve the cotton problem by adoption of a policy definitely shutting the doors to prospective purchasers. "And if they cannot get the cotton in the United States it is going to be worse for the South in the long run," he added.

"I believe it will be a most serious mistake for the cotton industry to go ahead for a year, with exports at their lowest level in forty years, and vacate its share of the export market," the Secretary declared.

U.S.A. AND RAW COTTON BARTER SCHEME

Recent press advices from New York state that the House of Representatives has been urged by President Roosevelt to expedite the passage of the Bill that would permit the purchase of £20,000,000 worth of goods by a barter arrangement with Great Britain, Holland, and Belgium. It is suggested that the United States should exchange wheat and cotton surpluses for tin and rubber.

The Bill gives the Government the right to dispose of the surpluses.

It is reported that Mr. Wallace, U.S. Secretary of Agriculture, after a conference with President Roosevelt, said that cotton which might be bartered against rubber and tin might conceivably exceed one million bales.

He added that the President advised him to confer with members of Congress in regard to the legislation which might be needed both for the barter plan and for the cotton export subsidy which was proposed earlier.

There is, however, considerable diversity of opinion concerning the passage of the Bill.

COTTON ACREAGE, 1939

The "Intentions to Plant Report as of March 1" indicates very little change in cotton acreage for 1939 compared with that of 1938. The report shows farmers in the main Cotton Belt will increase acreage to such crops as soybeans, peanuts and tobacco. There will be some increase in tame hay. The grain crops such as corn and oats show no major changes for the Belt as a whole. Since cotton acreage allotments will be enforced by soil conservation penalties, there appears little in the Intentions to Plant Report to indicate any material change in the farm programme now in operation.

COTTON ACREAGE ALLOTMENTS IN 1938 AND ALLOTMENTS FOR 1939

State	Final State Allotments 1938	Acreage Planted 1938	Acreage Allotted For 1939
Virginia	59,576	41,000	58,000
North Carolina	1,005,505	884,000	987,000
S.C. Carolina	1,390,768	1,272,000	1,351,000
Georgia	2,229,799	2,128,000	2,246,000
Florida	89,349	90,000	89,000
Alabama	2,267,810	2,160,000	2,273,000
Tennessee	829,642	799,000	815,000
Mississippi	2,713,798	2,680,000	2,664,000
Louisiana	1,268,259	1,245,000	1,244,000
Arkansas	2,466,032	2,444,000	2,264,000
Missouri	391,188	373,000	390,000
Texas	10,429,865	9,534,000	10,064,000
Oklahoma	2,397,256	1,804,000	2,360,000
California	406,884	356,000	388,000
Arizona	200,383	206,000	191,000
New Mexico, etc.	112,492	128,000	141,000
Totals	28,285,572	26,144,000	27,525,000

WEIGHT OF COTTON BALES

Mr. Henry Plauche, secretary of the New Orleans Cotton Exchange, reports that the average weights of cotton handled at ports and overland from August 1 to the close of March were as follows:—

	1939		1938
	Number in bales	Average weights lb.	Average weights lb.
Texas	2,585,872	528·13	534·53
Louisiana	797,470	531·50	539·41
Alabama, etc.	67,704	530	521
Georgia	35,545	503·73	515·91
South Carolina	49,776	510	505
North Carolina	12,237	490	494
Virginia	13,570	500	500
*Tennessee, etc.	590,655	518·07	530·37
Total 8 months	4,152,829	526·75	533·70
August to February inclusive	3,931,794	526·95	533·78

* Average weights based on returns from Memphis and St. Louis. Memphis average 519·03 against 532·02 last year; St. Louis 506 against 505.

THE PROPOSAL TO CHANGE THE BASIS OF THE AMERICAN COTTON FUTURES CONTRACT

When the present cotton futures contract was formulated, several years ago, a predominant amount of the American cotton crop was of $\frac{7}{8}$ inch staple. For that reason the contract was based upon $\frac{7}{8}$ inch middling cotton.

But time changes all things, and it has changed the average staple of the cotton crop. Now roughly 12 per cent of the crop is $\frac{7}{8}$ inch in staple, and the predominant portion of the crop is of 15-16 inch in length.

This is one of the reasons for the present proposals for changing the terms of the cotton futures contract. It has been discussed several times. More recently meetings were held last October, without visible accomplishment, but a committee composed of cotton shippers and cotton spinners, with the Government and representatives of the cotton exchanges looking on, discussed the question even more recently.

Later on the briefs, which were prepared by both sides, will be presented to the boards of managers of the exchanges for action or non-action as the situation seems to warrant.

Briefly the questions at issue are :

1. Shall the basis of the contract be made 15-16 inch instead of $\frac{7}{8}$ inch with full discount for $\frac{7}{8}$ inch ? This question was deadlocked 3-3.
2. If the basis is changed, shall one inch be delivered at full differences or at percentage of differences ? This question was tied 3-3.
3. Shall 29-32 and 31-32 and 1 1-32 inch be delivered on contract as such ? This was tied 3-3.
4. Shall the present method of transferable notices used to settle outstanding contracts be changed by withdrawing the transferable feature and by allowing fewer notice days ? This question lost 2-4.
5. Shall a penalty be placed upon cotton in the certified stock after the cotton has been in the stock for six months or more ? This carried 6-0.
6. Shall a restricted number of grades and staples be allowed on any one contract for delivery ? Lost 2-3. One not voting.
7. Shall cotton be delivered free of any charge for high density compression ? Tied 3-3.
8. How shall irrigated cotton be handled ? Tied 3-3.
9. Do nothing about the contract ? Tied 3-3.

This gives some idea of the deadlock which exists between the mills and the shippers.

The cotton futures contract was originally designed as an insurance in the legitimate purchase and sale of cotton. It was never intended that it should be used as a means of buying and selling spot cotton, and there should be some ground on which both sides could meet for the benefit of both. In reaching this ground the speculator should not be overlooked. It is the speculator who, in the final analysis, makes the market. It is

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he who broadens the contract, and who often takes the long side of the hedges which are so essential to the cotton shippers and the cotton spinner.

Nor should the fact that the crop is predominantly 15-16 inch in staple be overlooked. It only seems reasonable to assume that a contract should be based upon a grade and a staple which is of predominance in the crop. Such was the case when the present contract was based upon $\frac{7}{8}$ inch, but this situation no longer prevails, and everything goes to indicate that it never will again. The world no longer wants $\frac{7}{8}$ inch staple. It wants 15-16 to one inch staple.

It is not for us to say what the exact terms on these various questions should be, but an agreement should be reached which is equitable to all concerned.

(U.S. Cotton Digest)

BALING OF AMERICAN COTTON

During September 1938 Mr. S. H. McCrory, Chief of the Bureau of Agricultural Engineering of the U.S. Department of Agriculture, visited the offices of the International Cotton Federation in Manchester. In collaboration with Mr. Fred Taylor, also of the U.S. Department of Agriculture, visits were arranged for Mr. McCrory to cotton spinning mills and cotton dock warehouses both in England and in France.

Mr. McCrory recently gave the following address before the Texas Cotton Association's annual conference at Houston, Texas :—

In Manchester I saw the condition of our cotton and foreign cottons as they were unloaded from the steamers at the dock and in large wharfside warehouses in which some 25,000 bales of American cotton was stored. I also saw bales from several countries in the opening rooms and warehouses of a number of cotton mills in the Manchester area. In France, through the courtesy of the French Cotton Spinners' Organisation, I examined cotton bales from various countries as they reached the large cotton warehouse at Le Havre.

The American cotton bale one sees abroad is, I regret to say, a poorly packaged bale when compared to foreign bales with which it competes in the markets of England and France.

AMERICAN BALES RAGGED

The bale of American cotton is, as you know, only partly covered on the sides. The bagging is frequently not put on smoothly and it is cut, torn, ragged and sometimes rotten. Sample cuts are numerous. The cotton that is exposed on the sides and in the cuts is frequently dirty or stained. I saw bales of American cotton which had apparently been carried in cars or cargo space used previously for coal or ore. I saw some stained with iron rust and some that were just plain dirty. The practice is to scrape dirty bales, and this scraping must be paid for by a deduction of at least two pounds to the bale. The American cotton growers stand this loss—not the buyer.

Bales of foreign cotton—I mean the cotton other than American—were almost without exception completely covered, and usually no sample cuts are seen in these bales as they are unloaded from the ships. Most of the foreign bales I saw unloaded in the transit warehouse in Manchester were sampled there. The same procedure was followed at Le Havre.

The bagging on foreign bales was usually lighter than that on American bales but seemed to serve its purpose very satisfactorily although it frequently showed small breaks where the bands had chafed it. The Brazilian bales I saw were very well covered as were the Egyptian bales. Bales from India were usually well covered, but I saw some lots that I was told were in arbitration which were rather poor bales covered apparently with re-used bagging in poor condition. As I observed the condition of the bagging on bales, it appeared that the light jute bagging—approximately 10 ounces per yard or less—was proving quite satisfactory.

TIES ARE OBJECTIONABLE

Sisal twine is an important objection. Considerable difficulty occurs at intervals with sisal twine and jute fibres which have become mixed with the cotton. These fibres cut the soft leather on the spindles and make it necessary to replace the leather if satisfactory spinning is to be done. This throws the mill out of gear and causes delay. The sisal fibres get in because bale patches are sewed on the bagging with sisal twine. The jute fibres come from frayed patches on cuts in the bagging. In the opening room of one mill my attention was called to a lot of American cotton with which they were having this difficulty. Examination showed that old bagging was intermingled with the surface cotton of most of the bales. In compressing one bale sisal twine and bagging had been mixed at least eight inches deep in the bale. Several mill managers mentioned this difficulty. If the use of sisal twine could be eliminated, I think this criticism would be largely stopped.

Air-cutting was a cause of complaint at a number of the mills visited. One mill manager had saved a lot of bale tags from bales, which, he said, were air-cut. These were mostly from Texas compresses. On examining some bales he had set aside on account of air-cuts we found that instead of air or compress cuts they were deep sample cuts where two parallel cuts from four to eight inches apart had been made nearly across the bale and very deep. The mill people did not understand why it was necessary to make this kind of a cut in sampling the bale and they think it injures the quality of the cotton.

On account of complaints in regard to air and compress cuts, I examined as many bales as I could in the open rooms of the mill. There were many deep sample cuts but actually I saw only two air-cut bales in England and one in France.

COLOUR OF INKS

Several spinners complained because in making some bales black ink was used instead of purple and because too much ink of either kind was used. They claim that the black ink is much harder to work in the spinning room in the mill than purple. Some American bales that I saw

were marked rather heavily and I believe that a way should be found to prevent too heavy a marking. Also, if our customers prefer purple ink to black it seems to me only good business to use the kind they prefer.

Metal in cotton bales anyone would consider a solid cause for kicking. From the manager of one mill who had called upon me in Washington in the spring of 1938, I had received a bitter complaint about iron in American cotton. From his description I could not identify the source of the metal, but I had asked him to send me some of the iron of which he complained. On reaching England I wrote asking permission to visit the mill and received a cordial invitation to do so. On arriving at the mill I learned that since his return he had been having the opening room force save all of the metal they found and every few days the findings were assembled and placed in an envelope on which the date was recorded. An examination of this metal showed that it was mostly buckles from bale bands which had apparently been broken at the compress.

Most of the cotton is very dry when it reaches the opening room and when the metal beaters on the opening machines strike the metal in the cotton, sparks are caused which under conditions prevailing in the opening rooms may cause fire. This particular mill reported they had had two serious fires which had shut the opening room down for periods of from four to five days each time, and some five or six incipient fires which were extinguished before they became serious. The practice of breaking buckles at the compress should be stopped and the bands should be cut so there will be no loose buckles to get mixed with the cotton. This apparently is already the practice at many of the compresses.

As I examined the various storages in England, I could not help but be disappointed at the condition in which our cotton reaches the mills. It seemed to me that the quality of the product we are exporting warrants better and more careful packaging. An attractive package has been found a good investment in other kinds of business and I cannot escape the conviction it would be to the advantage of American cotton growers and American cotton exporters if our cotton was put up in a better package than it now gets.

HIGH-DENSITY GINS

Apparently some countries are fairly successful in putting out high-density bales at gins, so we have reason to feel optimistic about our ability to make some improvement in our methods here.

Naturally, a problem that has brought about as much discussion as this one on high-compression baling at gins cannot be settled without a comprehensive study. Methods have been considered in our cotton belt for a third of a century, and for a considerable period preceding 1920 the literature on cotton marketing contained a large number of articles on the subject. Thirty years ago as many as eight companies were making and boosting high-density presses for gins. Some of them were designed for so-called "square" bales and some for "round" bales.

During the last year of the World War our War Industries Board recommended to the Railroad Administration that the production of high-density bales at gins could be encouraged by better carload rates

on such bales. But with the end of the war the movement for this improvement stopped.

Apparently there are some very real obstacles in the way of bale improvements which to the casual observer would appear to be a practical means of stimulating the sale of our cotton. Not only do we hope to find feasible ways to make an original gin package that will be ready for foreign markets, but that the cotton won't be damaged in the process and that it will be of good appearance and well protected against the hazards of much handling.

To be sure, research does not finally solve our problem. People in the cotton industry—ginners, machinery manufacturers, farmers, and exporters—must be stimulated to adopt improvements, and by united effort American cotton can become the impressive mountain in the trade that it should be by virtue of our natural advantages and the work we have done.

COTTON PATCHING

The Lane Cotton Mills of New Orleans, the firm manufacturing a cotton covering for American cotton bales, has recently announced that it is now manufacturing a $\frac{1}{2}$ -lb. cotton patch which will be used by cotton compresses to cover sample holes cut in cotton bales. This cotton patch will take the place of the usual 2-lb. jute patch.

It is claimed that by the use of cotton covering, cotton rope for bands and cotton patches, a total saving in weight of 20 lbs. per bale can be made. Thus there will be a saving in freight and other charges which are based on gross weights of 20 lbs. on every bale, or roughly 4 per cent., which on the total crop amounts to several million dollars.

NEPS IN COTTON

The U.S. Dept. of Agriculture have recently issued a publication (Bulletin No. 396) entitled "Neps and Similar Imperfections in Cotton." This publication is of great interest to spinners, especially those who have experienced trouble from this source. Nep has been particularly prominent in many of the various American types of irrigated cotton. As there have been hitherto but few attempts to arrive at an accepted definition of the term nep, the Department define the term as follows:—

"Most of the small imperfections can be divided into two groups, neps proper and particles of seed coat. Proper neps are only tangled fibres. Thin-walled fibres enter into the greatest number of neps and thick-walled fibres into the least. Seed coat particles are of two kinds—small pieces torn from the chalazal end of mature seeds and mote fragments crushed during ginning. Neps in any given sample may be the result of the combined influence of at least two main factors, namely, characteristics and type of treatment. No essential difference has been

found between the composition of neps in ginned cotton and those in products of manufacture. The number of neps appears to have increased during manufacturing processes. Fifteen kinds of neps are differentiated according to the type or types of fibres contained in the composition. One authority even considers neps in yarn to consist of all faults which are due to the presence of any material or fibre not normal cotton."

This definition of neps is rather broad, but useful to the carder or others. It is interesting to note that "No essential difference was found between the composition of neps in ginned cotton and those in products of manufacture." It is common knowledge that careless picking, faulty ginning, inefficient scutching and poor carding will increase neppiness in a mixture, but it seems inconceivable that drawing, drafting on the fly frames and spinning of the cotton can increase the nep. Casual examination of the waste from any of these processes will satisfy anyone that neps are removed during processing.

It would seem that the only feasible solution to test the efficiency of the card would be to test the amount of nep in the lap and compare with the amount in the web at the front. By this method a reliable guide would be presented to aid in the decision of an alteration of settings or speeds. The paper describes a method.

In selecting a specimen for counting a sample of, say, 5 grains might be selected and opened up into a loose state and a 1-grain representative sample from this should be sufficient for practical purposes. The sample should be evenly spread on a dark fabric-covered board, say, 4 in. \times 4 in., or a piece of glass. A piece of glass with ruled lines $\frac{1}{4}$ in. apart is placed over the specimen, and counting can now take place in each lined section until the whole has been covered. A magnifying glass might be usefully employed. The whole procedure need not take any great length of time, and a number can be made in a very short time.

In selecting a sample for testing from the web the best method is to place the fabric-covered board under the centre of the web as it leaves the doffer comb. The ruled covering glass can then be placed directly over the specimen, and when taken out is ready for counting. This, of course, is a far quicker method than selecting a specimen before carding and makes use of a unit area instead of unit weight. From this method very reliable data can be compiled and if required can be followed in every stage of production including spinning. Many difficult problems would be appreciably lessened by adoption of such a procedure, and problems which are only peculiar to certain mills and machinery layouts would be solved or at least greatly reduced in magnitude. The nep count record of the number of neps in a 1-grain sample of scutcher lap and in a 1-grain sample of card web would reveal the number of neps taken out by the card treatment. Complete statistics might be drawn up representing various grades of cotton, the appropriate speeds and settings, together with the most efficient organisation to produce a yarn of the best possible characteristics at a competitive price. Several controversial problems might be nearer to solution if the policy outlined was adhered to, such as: which is the more economical and effective—slowing down the doffer or speeding up of flats? What effect on the carding has the

setting of the licker-in ? Is a constant flat setting better for nep removal or a graduated setting ? These are only three questions, but a methodical recording of all data obtained by nep counting would be progress in the right direction.

STAPLE COTTON IN U.S.A.

【Mr. W. M. Garrard, General Manager of the Staple Cotton Co-operative Association, contributed the following survey to the March 1939 issue of the *Staple Cotton Review* :—The demand for staple cotton the past two months has been quiet. Occasionally a mill enters the market for a few hundred bales, and the order is quickly filled from merchants' stocks of hedged cotton. Practically no sales have been made at sufficient premium to lift cotton from the Government loan. Mills using staple cotton are, apparently, well supplied for several months ahead, though it is the general belief and our information leads us to the conclusion that if the demand for fine count yarns continues, substantial purchases of raw cotton must be made from the old crop to carry mills until the time when new crop cotton can be secured.

In order that we might ascertain the amount of free cotton in the Delta area, that is cotton not pledged for a government loan, we made a survey as of March 1 of all cotton in storage in Delta warehouses. The survey discloses that there are in storage in the Delta 167,938 bales of cotton pledged for the 1937 government loan and 242,150 bales pledged for the 1938 government loan. The total stock in all Delta warehouses on March 1, 1939, was 598,862 bales. The total number of bales pledged for the 1937 and 1938 loans was 410,088, leaving a free or unpledged stock of 188,774 bales on hand as of March 1.

It is therefore obvious, unless heavy curtailment takes place with mills using staple cotton, that the available supply of free cotton will not be sufficient to fill mill requirements through the summer months. If this proves true, then mills must turn to the loan cotton for their needed supplies, and to purchase loan cotton a sufficient price must be paid to liquidate the government loan, pay carrying costs, allow an equity to the grower and a small equity to the shipper. These costs combined will result in a higher premium than mills so far, with few exceptions, have paid—not an excessive premium, but a premium definitely higher than has been paid so far this season.

THE U.S. COTTON OUTLOOK

The following is extracted from the April 1939 issue of the Monthly Report of the National City Bank of New York :—

The outlook for cotton manufacturing is under the shadow of a tight supply of spot cotton, due to the impounding of more than 11,000,000 bales in the government loan ; some qualities are becoming scarce, and

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mills are unable to get prices for their goods which would permit them to pay the prices necessary to dislodge cotton from the loan. Moreover, there are few signs so far that legislation to facilitate releases from the loan this season will be passed. Cotton futures are cheaper than spots, and there is general uncertainty as to the value of the next crop, in view of the conflicting plans for dealing with it that the government is considering. This discourages forward buying all along the line. Thus the outlook for mill operations toward the end of the season is uncertain, and talk of curtailment is increasing. On the other hand, supplies of goods and mill stocks of cotton will be low on August 1 next, when the new season begins, and a strong pickup then is possible if the new crop comes on the market at a price which inspires confidence.

NEW MEXICO STAPLE COTTON

By G. N. STROMAN

The New Mexico Agricultural Experiment Station has been working since 1928 on new strains of Acala cotton which will combine earliness and high quality of fibre. In fact, the cotton breeding work has emphasised high quality of fibre only, and the earliness factor has been largely incidental to that quality. A considerable percentage of the cotton produced in New Mexico has matured after frost, which has caused more or less criticism in the markets. The cotton grown in this State which is mature at the first freezing date is of excellent quality in length and strength. In breeding for cotton of better quality for production under irrigation in New Mexico, it was desired to combine the earliness factor with a more uniform fibre of good length, in the belief that a fibre of uniform length in an early strain would attract the manufacturer to the cotton.

The New Mexico Agricultural Experiment Station, in co-operation with the Division of Cotton and Other Fibre Crops and Diseases of the United States Department of Agriculture, is the source of seed of most of the cotton grown in New Mexico. In order to provide all growers an opportunity of growing pure seed and to ensure that strains of cotton, or other crops, would not be lost through improper handling of seed stocks, the Experiment Station in direct co-operation with the Extension Service, places all seed stocks to be distributed to farmers in the hands of selected growers of the New Mexico Crop Improvement Association. The Extension Service has sponsored this organisation, and the Extension Agronomist is the secretary of the Association. This Association is responsible for the fact that approximately 95 per cent. of the irrigated cotton grown in New Mexico is of the Acala variety, and about 85 per cent. of the cotton is of the strain of Acala distributed from the New Mexico College of Agriculture and Mechanic Arts.

The Crop Improvement Association is divided into locals or chapters, usually formed around a co-operative gin, whose members make up the Association membership. Each spring the Experiment Station Agronomist

turns over to the Extension Agronomist the quantity of seed that is to be distributed from the Experiment Station that year. The Extension Agronomist then allots to each local the number of pounds of seed that they are to have as their share, after which each local meets and decides who is to grow this seed for the general distribution to Association members the following year. Each local pays a standard rate per pound for the seed, and they charge other members and farmers the same rate for the seed that they grow from their allotment. The best locals provide warehouse facilities and means of disposing of surplus seed to farmers who are not members of the Association. Many gin companies have standing orders from their patrons for seed from these locals of the Association.

TWO NEW STRAINS DEVELOPED

At present there are two new strains which have passed through the preliminary and advanced strain tests with records justifying their release to farmers. The older strains of College Acala distributed to growers in the past have had an increasing acreage and have been rather satisfactory to the growers.

These two newer strains are somewhat earlier, in that they mature a larger percentage of their crop before frost than do the older strains. They are somewhat better in germination and seedling vigour, which ensures a better stand with less effort. The fibre of these strains is longer than that of the cotton heretofore chiefly grown. The older strains have been about $1\frac{3}{4}$ inches in length; the newer ones will average $1\frac{5}{8}$ inches. Also, a point that should interest the manufacturer is that these newer strains are more uniform in length of lint. By the use of a fibre sorter in the breeding work, the percentages of fibres at least $1\frac{1}{8}$ inches in length has been increased from about 10 to 20 or 25 per cent.

ADAPTIVENESS OF STRAINS GOOD

Number 37A, one of the new strains of Acala cotton, was distributed during the spring of 1938 to growers in the Pecos Valley, and has been found to be better adapted to that valley than to the Mesilla Valley. The Pecos Valley, one of the largest cotton-growing areas of New Mexico, is in the south-eastern portion of the State, and the Mesilla Valley is a portion of the Rio Grande Valley in southern New Mexico. In 1937 this variety gave 50 per cent. more cotton the first picking and 20 per cent. more in total yield than the commonly-grown College Acala.

SEA ISLAND PROSPECTS

According to a preliminary survey undertaken by the American Cotton Crop Service, of Madison, Florida, there will not be any increase in Sea Island cotton acreage in Florida in 1939. This condition is largely the result of heavy increase in bright tobacco acreage in the "Old Florida Sea Island Belt." Before the advent of the boll weevil Sea Island cotton was the main cash crop grown by Florida farmers. Now three major

cash crops are grown in the "Old Florida Sea Island Belt." These crops are hogs, bright tobacco and cotton. The farmer plants the crop that offers the best cash return.

Reports from Georgia show there may be a slight increase in Sea Island acreage in 1939.

Approximately 2,000 acres of Sea Island cotton will be planted in the Mississippi Delta in 1939.

A report from San Benito, Texas, states that 1,500 acres of Sea Island will be planted in that vicinity.

It is believed Sea Island cotton has probably the best opportunity to make a strong comeback in the Mississippi Delta due to the fact that weather conditions are usually dry during the months of July and August which will enable the planters to poison the migratory weevils successfully. The annual summer rainy season begins in Florida during early July and largely prevents successful poisoning of migratory weevils.

SEA ISLAND OUTLOOK

The Sea Island cotton outlook in Florida is much better than for the same date last year. A long spring drought in 1938 prevented germination of planted seed until about May 1, over the greater portion of the Florida Belt resulting in a very late crop which was heavily damaged by wet summer weather conditions and migratory boll weevils. This year, however, the crop has been planted early and with sufficient moisture for seed germination, the plant is getting an early start. A Bill has been introduced in the Florida Legislature to furnish Sea Island growers free poison and molasses for weevil control.

(*The American Cotton Crop Services*)

AMERICAN COTTON AND THE INDIAN TEXTILE INDUSTRY

An interesting review of the cotton industry in India appeared in a recent issue of *Foreign Agriculture*.

The chief object of the article is to evaluate the loss of American cotton consumption in India through the decline in imports to that country of cotton goods produced from American cotton. The author arrives at the conclusion that the United States cotton grower exports 800,000 bales less per annum by reason of the above-mentioned reduction in imports of cotton goods chiefly from the United Kingdom. He does not, however, take into account the fact that had the cotton industry in India not consumed the raw cotton produced in that country, this raw material would have been exported to the world markets for consumption by the mills and in this way also reduced the world's consumption of American cotton. If a bale of cotton is produced, no matter where, it will eventually be consumed, either in the country of origin or elsewhere.

We reproduce the conclusions of the author below, and recommend the study of the complete report to those interested in the development of the Indian cotton industry :—

The drastic reduction in the ultimate consumption of American cotton in India is one of the results of the general shift in cotton consumption from Europe to the Orient. This tendency has been accentuated since the World War.

The two dominant factors responsible for the sharp decline in the final consumption of American cotton in India were, first and by far the most important, increased manufacture of piecegoods by Indian mills, accompanied by drastic curtailment in imports of British cotton piecegoods that were only partially replaced by imports from Japan; second and less significant, reduced consumption of cotton goods, attributed to a decreasing purchasing power of the Indian people and to the effects of a high tariff.

The poverty of the Indian people is so great that for some years to come there is little prospect of a rise in the per capita consumption of cotton cloth. It follows that any attempt to evaluate the future position of American cotton in that market will be conditioned by the ability of the Indian textile industry to satisfy all domestic requirements. Inefficient though the Indian industry is, it has, nevertheless, been able, with the help of the mounting import barriers, to keep down imported goods to about 25 per cent. of the pre-war volume. In recent years Indian mill production increased rapidly in volume and improved in quality and range. Imports in the future will be limited to those textiles of higher counts and finer qualities that the mills are not at present equipped to produce. Under the circumstances, exports of American cotton to the United Kingdom and Japan are likely to be reduced accordingly.

Other elements however, might stimulate an increase in exports of American cotton to India or to other cotton-consuming countries. With the continued increase in the Indian cotton-cloth output, the bulk of which will undoubtedly be manufactured from short-staple cotton, the demand for domestic cotton is bound to increase. This may result in a smaller volume of Indian available to compete with American in the world markets, unless, of course, the rise in Indian cotton production should outstrip the increase in domestic demand. Furthermore, the tendency to spin finer count yarns in Indian mills calls for an increase in the consumption of American cotton or some other growth of better quality than most Indian cotton. This tendency, together with relatively low prices of American cotton, seems to be the principal cause of the current increase in American cotton exports to India.

It must be emphasised, nevertheless, that even at best the two factors tending to stimulate larger consumption of American cotton will only partly offset the estimated annual average loss of nearly 800,000 bales sustained during the last quarter of a century. The fact is that India is fast approaching national self-sufficiency in cotton-textile requirements. It can readily be seen that as cotton-producing countries, such as India, continue to expand their tariff-protected domestic textile industries and to reduce imports from cloth-exporting countries, such as the United Kingdom, foreign consumption of American cotton is likely to be further curtailed. Expansion of the industry and curtailment of imports have been the main features of Indian post-war economic policy, and there is

no indication of a change in this policy. It seems likely, therefore, that final consumption of American cotton in India will remain at materially reduced levels.

NET WEIGHT COTTON BILL

There is widespread interest in the cotton industry in a Bill, introduced into the United States Senate by Senator Bilbo, of Mississippi, providing that cotton, like all other major commodities, shall be sold on a net weight basis. It has been referred to the Senate Committee on Agriculture and Forestry, and hearings on it are to be held by that Committee. The Bill is widely supported by the industry. Proponents of the measure believe that the enactment of the Bill would result in the abolition of the practice of putting excessive tare on cotton bales, which results in excessive freight charges in moving the crop, and that it would lead growers to use cotton bagging, rather than jute bagging, thus opening up an additional market for 150,000 to 200,000 bales of cotton per year. The Bill is designated Senate Bill 1228. The Cotton Textile Institute is making a strenuous effort to bring it to the attention of all interests in the industry, so that maximum support will be given to it.

CROP REPORTS

The *American Cotton Crop Service* has communicated the following under date of April 19 :—

TEXAS MOISTURE SITUATION.—With the planting season in Texas well under way over the southern two-thirds of the State and just beginning in the northern third, the moisture situation becomes increasingly important. Drought prevails over the southern, south-western and west-central portions and soils have been too wet over the north-eastern portion. For the State as a whole March precipitation was 1.04 inches, which is 0.99 inch below normal. Subsoil moisture is somewhat improved in the Pan Handle area but high winds have dried out the top soil rapidly.

Drought in the southern two-thirds of the State means delayed germination and poor stands. Overwintering boll weevils do not leave winter quarters until a certain moisture condition is brought about and the present droughty condition is delaying emergence of the pest which will insure the late-emerging weevils a better chance to deposit eggs for the first weevil generation. Last year frost killed the crop to the vicinity of Corpus Christi making the crop north of that point to the Oklahoma State Line planted at about the same time. This year drought is producing much the same condition.

INSECT PEST OUTLOOK.—With the estimated damage from cotton insect pests approximating \$3,000,000 per year, we call the trade's attention to the insect pest outlook as follows :—

The late spring with mean daily temperatures running below 56 degrees F. in most weevil-infested localities has retarded emergence of the over-wintered weevils from hibernation. Drought in South Texas has also retarded emergence of the pest. The normal emergence of the weevil from hibernation shows a relatively high percentage of the over-wintered weevils out of hibernation and in the cotton fields by April 20 in the southern half of the Belt. When weather conditions retards emergence a much larger number of weevils enter the cotton fields late and have a better opportunity of depositing eggs for the first generation as a larger number will be present in the fields when squares are developed by the plants. Therefore, with a heavy weevil dernity in hibernation in the southern half of the Belt and the crop getting off to a late start, weevil damage can be much greater than expected should showery weather conditions develop during the period about June 15 to July 15.

Other insect pests of cotton such as thrips, cut worms, grasshoppers, cotton

fleas, etc., are usually localised and damage the crop according to weather conditions experienced.

A cable received from the *American Cotton Crop Service*, dated April 26, reads as follows :—

Crop southern half of Belt about ten days late. Weevil emergence from hibernation somewhat retarded by low April temperatures which may mean increased damage by this pest.

Messrs. Weil Brothers, Montgomery, Alabama, state as follows in their Semi-monthly Crop Letter dated April 17, 1939.

Weather during the first half of April was for the most part favourable for the continued preparation and planting of the crop. Scattered but heavy rains for a few days, together with some unseasonably cool weather delayed to some extent the ground preparation and planting, as well as the germination of seed already planted. Over the southern sections of the whole Belt planting has been general and is nearing completion ; good stands being reported over a large portion. In the middle sections of the Belt planting is progressing rapidly and with continued favourable weather should be completed within ten days, with much cotton up by that time. In the northern sections of the Belt preparations are considerably later but a great deal has been accomplished during the past fortnight and planting should be in full swing by the first of May. The whole Belt, with the exception of west Texas and extreme south Texas, has plenty of moisture in the ground. The pitching of this crop is average—just about normal.

Activity in spots has been confined to sales out of shippers' stocks, there being practically no cotton offered from first hands. The scattered but small demand from spinners has now almost depleted the hedged stocks for the qualities generally sought. The amount of cotton in spinning centres constitutes not over two months' supply at the present rate of consumption, indicating that without curtailment considerably more cotton will have to be purchased by the mills. Exports continue small, with little or no new demand. Unsettled conditions abroad, together with the uncertainty of Washington legislation, has left the futures market languid. It has not reflected the apparent shortage of spots which may materialise in case no loan cotton is available.

The *New York Cotton Exchange Weekly Trade Report* dated April 17, from which we quote the following, deals with the prospective end season free supply of cotton.

With only three and a half months to the end of this season, it is evident that, unless the Government releases loan cotton or domestic consumption of cotton declines more than seasonally or cotton exports are reduced to a mere dribble, the stock of domestic cotton in merchandising channels in this country at the end of this season will be quite as abnormally small as has been anticipated. If domestic consumption during the remainder of this season declines only seasonally, this country will consume a total of about 6,700,000 bales of the domestic staple in the full current season. If exports during the rest of this season bear the same relationship to those in the corresponding period last season as they have in the last eight weeks—about one-third less—total exports by this country in the full current season will aggregate about 3,450,000 bales. Domestic consumption may total somewhat less and exports may total somewhat more than the foregoing figures, but it seems very probable that domestic consumption and exports combined are likely to approximate the sum of these figures, or about 10,150,000 bales. It may be calculated that if this is the total disappearance of cotton out of the domestic supply, and if no loan cotton is released, the total stock of American cotton in all hands in this country, exclusive of the Government loan stock, at the end of this season will be only about 1,650,000 bales.

It may be readily seen that an end-season stock in domestic merchandising and consuming channels of 1,650,000 bales is decidedly below normal. Domestic mills normally carry around 1,000,000 to 1,100,000 bales in their own warehouses at the end of the season. They also have to have some cotton bought ahead for delivery in the opening weeks of the new season. Exporters normally have some forward sales on their books at the end of the season, calling for shipments in the opening weeks of the new season, and they will probably have a little of such business at the end of this season, although nothing like what they would have if most of the supply of cotton were not locked up in the Government loan stock. The prospective end-season domestic "free" stock is about 1,000,000 bales, or about 40 per cent. less than normal.

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Germany :

Edmund Dilthey, Aug. Dilthey & Söhne, Mülfort.

Protectorate of Bohemia and Moravia :

Representative to be appointed.

The Minister of Agriculture of Egypt and the President of the International Cotton Federation are ex-officio members.

General Secretary : N. S. PEARSE.

Hon. Secretary : JOHN POGSON, J.P.



EGYPTIAN COTTON

GINNINGS TO END OF MARCH, 1939

The Ministry of Agriculture has published the following figures showing the quantity of cotton ginned in Egypt from September 1, 1938, to March 31, 1939 :—

Giza 7	1,721,397	Crs.	} Against total of ginned cotton from Sept. 1, 1937, to March 31, 1938 .. 9,345,265 Crs.
Long staple Varieties	667,685	"	
Long average staple Varieties	201,191	"	
Average staple Varieties	4,665,911	"	
Scarto	147,638	"	
Total	7,403,822	"	

SPINNING TEST REPORT ON THE EGYPTIAN COTTON CROP OF 1938

(Compiled by Mr. H. A. Hancock, Spinning Technologist, Egyptian Ministry
of Agriculture Spinning Test Mill, Giza.)
(Comparable Data for 1937 Crop in brackets.)

	Lea Strength Product 60's carded	Leaf and Trash %	Staple Length ½-in.	Hair Weight per cm.	Spot Price (tallaris) 3 year avge.
SAKEL					
FG	2695 (2600)	1.0 (0.9)	49 (48)	131 (135)	20.9
FGF	2300 (2360)	1.9 (1.5)	48 (47)	127 (128)	16.5
SAKHA 4					
FG	2645 (2520)	1.0 (1.0)	50 (51)	128 (132)	18.9
FGF	*2450 (2370)	1.9 (1.5)	50 (51)	123 (118)	15.9*
MAARAD					
FG	2505 (2500)	1.1 (1.0)	52 (52)	133 (133)	18.9
FGF	2280 (2235)	2.3 (2.5)	51 (51)	130 (132)	16.3
GIZA 7					
FG	2490 (2440)	1.0 (1.2)	46 (47)	148 (159)	17.3
FGF	2170 (2165)	2.2 (2.3)	46 (45)	147 (151)	15.0
GIZA 12					
FG	2260 (2220)	1.1 (1.1)	47 (47)	160 (160)	16.3
FGF	*2065 (1870)	2.0 (1.9)	47 (47)	150 (158)	13.3*
UPPERS					
FG	1800 (1725)	1.4 (1.4)	40 (41)	174 (173)	14.6
FGF	1690 (1670)	3.9 (3.9)	40 (40)	160 (155)	13.0
ZAGORA					
FG	1635 (1560)	1.1 (1.2)	41 (40)	191 (193)	13.9
FGF	1505 (1495)	2.5 (2.2)	41 (40)	180 (179)	12.9

Discussion of Results. In grade Fully/Good nearly all of the varieties have given a higher strength in the new crop and have a tendency to be finer, as shown by the hairweight. In grade Fully/Good/Fair Sakha 4, Maarad and Giza 12 are also stronger than last year, but the other varieties are nearly unchanged.

On balance, staple lengths are much the same as last year, Sakel and Zagora being slightly longer, and Sakha 4 slightly shorter.

Notes on the Tests. The samples on which these tests were made were drawn from bulk deliveries sold in the ordinary course of business to spinners all over the world, and are in no sense experimental growings. They were all of "good staple" and fully representative of their type, being obtained in each case from about thirty different trade sources and mixed together (except Sakha 4 FGF and Giza 12 FGF, marked by * in the table, of which only half a dozen examples were available). Apart from the two exceptions, the figures quoted are the means of three or four independent spinnings; and the data for 1937 are based on re-spinnings carried out at the same time as the 1938 samples.

The strength value quoted is the product of the lea strength in lbs. times the observed counts. Leaf and trash per cent. is the amount of extraneous matter determined by the Shirley Analyser. Staple lengths are from the Balls Sorter Diagram, quoted in $\frac{1}{32}$ -in. units; on multiplying by 0.8 they are converted to millimetres. Spot prices are quoted in Alexandria tallaris (dollars) per kantar, averaged for the three seasons beginning 1935-36. On dividing by two, the prices are converted to approximately pence per lb. at Liverpool.

DARK FLECKS IN EGYPTIAN COTTON

The following is an extract published by the *Manchester Guardian* on January 4, 1939 :—

AN EGYPTIAN COTTON PUZZLE.

"Several cotton spinners and manufacturers in Lancashire are experiencing a new difficulty with their raw material this season. A considerable quantity of Upper Egyptian cotton appears to be contaminated in an unusual way, being spotted with small, dark flecks of some oleagenous or tarry matter. It has been found impossible readily to remove this impurity from the cotton fibres before spinning, and when cloth made from the cotton is finished the flecks are flattened out into dark deposits about the same diameter as that of an ordinary lead pencil. Tests have failed to identify the impurity, though some of the traders who have been affected by the difficulty believe that the root of the trouble is creosote, which may have been sprayed on the growing cotton plants as an insecticide. The removal of the deposit from the cloth is a long and tedious business."

The following opinion upon this report has been expressed by Mr. Hancock, Spinning Technologist to the Egyptian Ministry of Agriculture :—

"The Egyptian Ministry of Agriculture inform us that one example of the black spots had been brought to its notice, and was found to be of a bituminous nature.

"After considering the various stages of growing, picking, ginning, baling, transport, etc., it was difficult to imagine how such a substance could get into cotton inside Egypt. Bitumens are not in such common use in Egypt as in many other countries, and in general farm economy such as preservation of wood fences or control of tree pests their use is almost unknown. The largest use of tarry materials is in road making, but the enormous proportions of country roads here are earth roads.

"Such tarred main roads as we have cannot conceivably be an appreciable source of contamination in any case, as almost all the cotton is carried by barge or rail.

"The theory that creosote is used for spraying growing cotton plants was discounted by the Ministry, who incline to the opinion that the spots could not have been inside the bales when they left Egypt."

THE EGYPTIAN COTTON TRADE

The following is extracted from an article contributed to the *Egyptian Gazette* by M. A. R. Hafez, M.A., of the Faculty of Commerce of the Fuad el Awal University.

THE ESTIMATION OF GRADES ON PURCHASE

The trader buys cotton at warehouses or shounas. In both cases cotton is sorted out to determine the grade, on which basis the price is fixed. If the cotton at the warehouse is of uniform quality, estimation is easy, but if it is of diverse qualities, an average is established for these grades. The same idea rules if cotton is bought at warehouses, shounas and halakas.

At Minet-el-Bassal Exchange, premiums or discounts for the different grades are fixed daily, while the price of the basic grade (F.G.F.) is determined at the futures Exchanges. To ascertain the average grade, the following procedure is followed :—

Premiums or discounts are taken for the different grades according to the tariff established by the Minet-el-Bassal Exchange. The number of sacks for each grade (each sack containing one kantar) is multiplied by the amount of the premium marked for that grade. The product is then added and divided by the number of sacks or kantars, producing the average premium. Then the price of the original grade is modified by adding the average premium ; if the cotton as a whole exceeds the original basic grade. For example, assuming a trader wishes to buy 120 sacks, and on sorting them out finds that : 20 sacks are graded F.G. (fully good) ; 35 sacks are graded G. (good) ; 40 sacks are graded F.G.F./G. (fully good fair to good) ; 25 sacks are graded G.F. (good fair) ; and assuming that the premium for the grades according to the Minet-el-Bassal Exchange

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Bulletin is for the : F.G.—4 dollars above futures contracts ; G.—1 1/2 dollars above futures contracts ; F.G.F./G.—3/4 dollars above futures contracts ; G.F.—1 1/2 dollars below futures contracts. Thus :—

20 × 4	= + 80
35 × 1 1/2	= + 52 1/2
40 × 3/4	= + 30
25 × 1 1/2	= + 37 1/2
<hr/> 120	<hr/> 125

The premium, then, amounts to $125 + 120 = 1.04$ dollar.

On consideration of Minet-el-Bassal premiums, it transpires that the average grade which is the counterpart of 1.04 is the F.G.F. to G. (or Good-half grade), and that the price assessed for it in the country is 1.04 dollars above futures contracts, and then minus the profit which the trader estimates for himself, together with ginning, insurance and transport (to Alexandria) expenses. Finally to the balance must be added the price of the seed. Here, we should observe that if the price of the seed covers these expenses all that remains to be done is to deduct the profit.

COST OF COTTON PRODUCTION

The Co-ordination and Preparatory Sub-Committee of the Advisory Cotton Council recently considered the subject of the cost of cotton production and it was arranged that the Director of the Economic Researches Administration in the Ministry of Commerce and Industry should prepare a report.

This has now been submitted. It points out that the sub-committee had considered only the cost of seed, ginning, fertilisers, fuel and transport, whereas there was also irrigation, the maintenance of cattle and implements, labour, pressing and transport.

As regards seed, the report suggests that not only should the Agricultural Credit Bank distribute on a larger scale, but the rate of interest for the cost should be reduced.

FERTILISERS

Dealing with fertilisers, it explains that a monopoly has been established by three large firms in the United Kingdom, Germany and Chile, which, by means of a cartel, controls the market and fixes prices. But these prices have not fallen in the same way as those for cotton. It is therefore proposed that the Agricultural Credit Bank and the Royal Agricultural Society, the principal importers in Egypt, should make it their business to bring about a reduction in Egypt commensurate with the decline in cotton prices. It is further pointed out that the Agricultural Syndicate has already suggested that the Government should fix a maximum price, beyond which fertilisers should not be sold in Egypt. But, as a last resort, it is said that the Government could consider the

possibility of exempting fertilisers from customs duties, as was previously the case.

IRRIGATION

The cost of irrigation is said to depend largely on prices of fuel used for driving the pumps, and as they were increased in 1938 owing to the international situation, costs of irrigation have risen. But as customs duties on fuel have already been reduced, some other means of reduction must be obtained.

The report then criticises the large irrigation companies saying that in Upper Egypt farmers are charged from L.E.3 to L.E.6 a feddan for irrigation, whereas the actual costs range from only P.T.72 to P.T.345. Since farmers are dependent on these companies, however, they are forced to pay the price, and it is suggested that the Government, which grants licences for this work, should use this as a means of effecting a reduction of the charges to farmers.

Referring to ginning, the report says that the various companies and syndicates should be asked to reduce charges, but offers no suggestions as to possible ways and means.

TRANSPORT

Finally, as regards transport, it points out that prior to July, 1933, transport was based largely on competition between the E.S.R. and inland navigation. But then an agreement was reached between the two parties, which came into operation in September, 1933, to be renewed annually, whereby all transport in Lower Egypt should be left to the E.S.R., and elsewhere the latter's charges would be 20% higher than those charged for inland navigation. Despite this the rates for transport drifted steadily lower from 1933 to 1938 and when, in that year, the agreement with the E.S.R. was not renewed, both parties cut prices still further. The report, therefore, concludes that there is little hope of any reduction in transport costs.

(Egyptian Gazette)

EGYPTIAN COTTON CONSUMPTION IN EGYPT

The increased local consumption of Egyptian cotton raises some interesting problems. The import of cotton for the local industry is at present prohibited, so that the position in Egypt is now the exact opposite of that in India and the United States.

Both the latter countries, producing chiefly low-quality cotton, use internally the majority of the small quantity of better staple types grown, while in addition they require to import the better quality Egyptian cotton to keep pace with their local consumption of these types. In the main, therefore, both India and the United States are exporting only the lower part of the range of staples grown.

In Egypt, obliged to use Egyptian cotton, the local industry is using only the lower grades, and those principally of Ashmouni and Zagora, the lowest quality varieties grown. It is obviously necessary for them to confine themselves to the bottom of the range, as the majority of fabrics produced have to be sold in competition with imported goods made principally of Indian and American cotton. The high import duty, therefore, does not give the local industry as big an advantage as might be expected.

It has been estimated that local production will increase within the next year from one-third to one-half of local requirements, an increase of 50 per cent., and that much smaller quantities of low-grade cotton will appear in the export market as a result. It seems fairly easy to forecast that the increased local consumption of the lower grades, together with the increased average grade of the crop which has been noticed recently, is likely to lead to a squeeze in low-grade Egyptian cotton. This would probably lead to a closing up of the grade premiums to a point where low-grade Egyptian would not be worth the outside spinners' while to bid for.

A shortage on the export market of the present contract grade, fully good fair, has recently been given as the reason for the request put by Alexandria exporters to the Government to raise the contract grade to good. This suggestion has not yet been given Government approval, the principal reason apparently being opposition by growing interests, who fear that the present premiums on contracts obtained for high-grade cotton will be reduced, without the corresponding rise of the price of the contract which should theoretically follow.

The alternative proposal of permitting the import of low-quality foreign cotton for the use of the local industry has not yet been much discussed, but it appears probable that it will ultimately be raised.

(Manchester Guardian Commercial)

MISR TEXTILE MILLS

Muhammad Talaat Harb Pasha, in his annual report at the general meeting of Bank Misr, made several interesting comments upon the Egyptian textile industry.

Dealing with the Bank's affiliated textile companies, Talaat Harb Pasha pointed out that a woollen goods factory had now been established at Mehalla el Kobra and therefore there was no reason why, in future, Egyptians should not obtain textiles of wool, cotton, linen and silk of purely local manufacture.

The Misr Fine Spinning & Weaving Co. at Kafr el Dawar, was expected to be ready for production in 1940, which was two years ahead of the original schedule.

This mill will have a very extensive plant with spinning, weaving, dyeing, printing and finishing departments. It is said that there will be

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Continuing, Talaat Harb Pasha said he hoped that the local production of cotton textiles would steadily increase so that in time they could meet all the local requirements, and, in the meantime, he hoped that they would continue to be protected against cruel foreign competition. It was noteworthy, he said, that the Government had increased the customs duties on imported cotton piecegoods, as persistently demanded by Bank Misr since 1933, and finally it had adopted an amended quota system; different to that previously demanded by Lancashire and refused. This was the first time, he said, that the local textile industry had been considered on a correct and sound basis.

(*Egyptian Gazette*)

CROP REPORTS

Messrs. Reinhart & Co., Alexandria, Egypt, have sent us the following communication dated April 21, 1939 :—

A much improved trade demand which set in at these low levels coupled with foreign reports that the subsidy plan in the U.S.A. was encountering increasing difficulties caused a sharp recovery on Saturday after Easter. Prices have remained well sustained since. It was reported on the 19th inst. that President Roosevelt might be inclined to reduce by 50 per cent. the 7 cent import tax on long staple cotton but, curiously enough, this news did not affect the market at all.

The Statistical position of Egyptian cotton continues to be very strong: the local stock is now smaller than at the same time last year in spite of a carry-over of 1,500,000 cantars on September 1, 1938, as against 350,000 cantars the year before, and in spite of a somewhat larger crop than previously estimated, viz., about 8,000,000 cantars.

So far this month 67,000 bales have been exported as against 47,000 bales during the same time last year. It can be expected that exports will continue to be good for some time to come, because considerable fresh business in old crop cotton has been concluded during the recent period of depression.

New Crop.—Crop reports from Upper and Lower Egypt continue to be satisfactory all round.

Messrs. Cicurel & Co., of Alexandria, in their market report dated April 20, make the following statement :—

The past few weeks have been marked by extreme weakness in the Alexandria Cotton Futures Exchange. Since our previous letter minimum prices have had to be introduced in a number of sessions with the consequent result that dealings were almost brought to a standstill. In order to prevent the discrepancy between the official limits and the natural level of prices to widen beyond a certain extent, the Cotton Exchange Committee gradually reduced the minimum figures to :—

11.10 for the May (Sakel) option.
10.90 for the May (Giza 7) option.
8.96 for the June option.

However, practically no buyers came forward at these prices and the very few dealings concluded were for the October Uppers (new crop) option.

Since the 14th, price restrictions have been abolished and the market staged an appreciable advance which, however, proved short-lived. Lately, the tone weakened again despite the improvement in American.

Egyptian values were affected to a much greater extent than American by the recent turn of the international situation owing to the country's geographical position. As to the latest Washington plans, these have also had a more depressing effect at this end than in the United States as both the subsidy and the barter programmes tend to unload on foreign markets the American surplus stocks.

The question of Egypt's reply to the American projected measures has not yet received a definite solution. The Finance Minister would probably have wished growers to seek relief in a reduction of production costs. Nevertheless, following a meeting of the Cotton Advisory Board especially convened to devise on the means of alleviating the crisis, an official communique was issued stating that should the American Government resort to an export bounty, the Egyptian Government would endeavour to compensate the harm caused to local growers. The Government therefore, sees no justification for the anxiety prevailing in Egyptian cotton circles. The document in question does not state explicitly that a subsidy would be granted to Egyptian exporters as well.

SPOT.—The market was but moderately active at first. The turnover would have been larger if the minimum prices for futures had not hindered new business. Part of the orders were fulfilled out of exporters' stocks. Of late, demand has broadened and daily sales now exceed 2,000 bales.

The Alexandria Commercial Co., S.A., report as follows under date of April 21 :

SPOT.—The market this last week has been slightly better and the week's totals are about 15,300 bales of which we estimate 4,700 bales Ashmouni, 3,800 bales Zagora, 5,000 bales Giza 7 and 1,800 bales other varieties.

ASHMOUNI.—Has been quiet and the premiums for short staple cotton were much easier. Good staple Ashmouni has been very scarce.

ZAGORA.—There was a good demand for all grades at last week's premiums.

GIZA 7.—There was a much improved inquiry and premiums for cotton above Good have risen as compared with last week.

OTHER VARIETIES.—Apart from Sakel which was in good demand, these outside varieties were very quiet.

CROP, 1939.—News received from our branches in Upper Egypt informs us that weather conditions have been favourable and that the plant is progressing everywhere normally. In Lower Egypt on the other hand, temperature has been rather cool and this has naturally delayed progress, as the crop is in need of a long period of warm weather in order to make up the initial delay.

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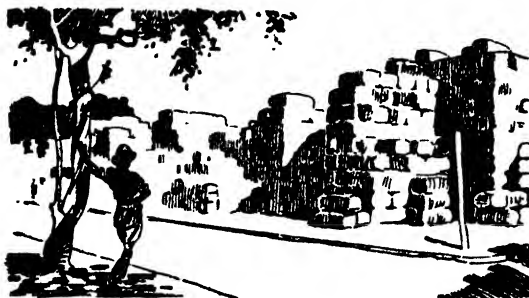
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FINAL GENERAL MEMORANDUM ON THE COTTON CROP OF 1938-39

This memorandum is based on reports received from all the provinces and States and refers to the entire cotton area of India. It deals with both the early and late crops of the season. Information regarding the late crops in certain tracts, chiefly in Madras, Bombay, Sind and Hyderabad, is not, however, complete at this stage. A supplementary memorandum will therefore be issued, as usual at a later date, containing full and final figures for the above-mentioned tracts together with revised estimates, if any, for other areas.

The total area now reported is 23,483,000 acres, as against 25,324,000 acres, the revised estimate at this date last year, or a decrease of 7 per cent. The total estimated yield now stands at 4,881,000 bales of 400 lbs. each, as compared with 5,682,000 bales (revised) at the corresponding date of last year, or a decrease of 14 per cent.

The condition of the crop, on the whole, is reported to be fair.

The detailed figures for each province and State are shown below.

Provinces and States	Acres (thousands)		Bales of 400 lbs. each (thousands)		Yield per acre (lbs.)	
	1938-	1937-	1938-	1937-	1938-	1937-
	39	38	39	38	39	38
Bombay (a)	5,720	5,882	1,102	1,187	77	81
Central Provinces and Berar..	3,742	4,047	555	713	59	70
Punjab (a)	3,652	3,986	1,242	1,513	136	152
Madras (a)	1,874	2,512	376	489	80	78
United Provinces (a)	667	595	181	200	109	134
Sind (a)	960	1,043	323	391	135	150
Bengal (a)	88	88	28	27	127	123
Bihar	43	43	7	8	65	74
Assam	36	45	14	24	156	213
Ajmer-Merwara	27	37	8	15	119	162
North-West Frontier Province	22	22	5	4	91	73
Orissa	8	8	1	1	50	50
Delhi	2	2	(b)	1	122	139

FINAL GENERAL MEMORANDUM—*continued*

Provinces and States	Acres		Bales of 400 lbs.		Yield per	
	(thousands)		each (thousands)		acre (lbs.)	
	1938- 39	1937- 38	1938- 39	1937- 38	1938- 39	1937- 38
Hyderabad	3,477	3,497	505	560	58	64
Central India	1,189	1,323	164	142	55	43
Baroda	863	914	180	219	83	96
Gwalior	561	668	90	78	64	47
Rajputana	468	527	89	99	76	75
Mysore	84	85	11	11	52	52
TOTAL	23,483	25,324	4,881	5,682	83	90

(a) Including Indian States.

(b) About 500 bales.

A statement showing the present reported estimates of area and yield according to the recognised trade descriptions of cotton, as compared with those of the preceding year, is given below.

Trade Descriptions

Descriptions of cotton	Acres		Bales of 400 lbs.		Yield per	
	(thousands)		each (thousands)		acre (lbs.)	
	1938- 39	1937- 38	1938- 39	1937- 38	1938- 39	1937- 38
Oomras—						
Khandesh	1,248	1,317	278	327	89	99
Central India	1,750	1,991	254	220	58	44
Barsi and Nagar	2,191	2,337	339	406	62	69
Hyderabad-Gaorani	922	949	129	139	56	59
Berar	2,644	2,865	406	505	61	71
Central Provinces	1,098	1,182	149	208	54	70
TOTAL	9,853	10,641	1,555	1,805	63	68
Dholleras	2,259	2,479	351	484	62	78
Bengal-Sind—						
United Provinces	667	595	181	200	109	134
Rajputana	495	564	97	114	78	81
Sind-Punjab	2,189	2,624	634	977	116	149
Others	57	57	10	11	70	77
TOTAL	3,408	3,840	922	1,302	108	136
American—						
Punjab	1,790	1,777	693	692	155	156
Sind	657	652	243	240	148	147
TOTAL	2,447	2,429	936	932	153	153
Broach	1,419	1,450	367	372	103	103
Coompta-Dharwars	1,232	1,101	199	145	65	53
Westerns and Northern	1,738	1,811	239	183	55	40
Cocanadas	129	143	22	25	68	70
Tinnevellies	458	530	112	124	98	94
Salems	79	194	13	36	66	74
Cambodias	334	569	123	223	147	157
Comillas and other sorts	127	137	42	51	132	149
GRAND TOTAL	23,483	25,324	4,881	5,682	83	90

The area sown with cotton in Burma is reported to be 449,000 acres, as against 563,000 acres last year. The yield is now estimated at 106,000 bales of 400 lbs. each, as compared with 150,000 bales last year. The quantity likely to be exported from the present crop is estimated at 101,000 bales.

EFFECT OF COMPRESSION ON INDIAN COTTONS

By NAZIR AHMAD, M.Sc., Ph.D.,
Director, Technological Laboratory, Matunga, Bombay

The following extract from the Indian Central Cotton Committee Technological Bulletin, Series A, No. 40, is taken from the *Indian Textile Journal*.

Although 85-90 per cent. of the world's cotton crop is grown in six countries (U.S.A., India, Russia, China, Egypt and Brazil), yet the cultivation of cotton is carried on over a very large area of the globe. In a recent issue of the *International Cotton Bulletin*, results of cotton bale inquiry, giving data for measurement, weights and density of the bales, bands, ties and wires, etc., have been given for no less than 48 countries in which cotton is grown, ginned and pressed into bales. A perusal of these useful tables brings out in a striking manner the great diversity which prevails as regards the measurements, weights and density of bales of cotton grown in different parts of the world. It will be seen from these tables that the weights of the bales may vary from about 100 lb. to over 750 lb., while the overall dimensions may vary from 4 cu. ft. to 48 cu. ft. From the point of view of the spinner these differences in weights and overall measurements are unimportant; but they are generally associated with differences in the density of the bale. It will be seen from the same tables that the density of bales of cotton, prepared in different parts of the world, may vary from about 8 lb. per cu. ft. to over 55 lb. per cu. ft. It is here that opinion among the spinners is divided, some holding the view that the compression of cotton—especially long staple types—into high density bales (by which it is generally understood that the density exceeds 30 lb. to the cu. ft.) is injurious to the fibre and has a deleterious effect upon the spinning quality of the cotton, while others maintain that although high density bales may be somewhat difficult to handle and may require a special treatment in the blow-room, yet no injury is done to the fibre.

In India, as in the other principal cotton growing countries, the dimensions, weight and density of the bale show considerable variations. These variations are partly due to the use of different types of presses and partly to the fact that railways recognise, for freight purposes, two different conditions of packing, namely, (1) full pressed and (2) half-pressed bales, the former having a density of more than 30 lb. per cu. ft., while the latter should have a density of 15 to 30 lb. per cu. ft. In view

of the fact that the proportion of medium and long staple cottons in the Indian crop is steadily increasing, the question was raised whether compression of such good quality cottons into bales having a density of 40 lb. to the cu. ft. was not injurious to their fibre. A preliminary investigation on Oomra cotton had shown that no appreciable injury was caused to the fibres by raising the density of a bale of this cotton from about 20 lb. per cu. ft. to 40 lb. per cu. ft. It was, however, felt that if any such effect existed, it would be more marked with a comparatively long staple than with a short staple cotton. Accordingly, tests were carried out on 4 good quality Indian cottons, namely, P. A. 289F, Surat 1027 A.L.F., Jayawant and Cambodia Co. 2 and the results obtained are described in the above-named Bulletin.

Apart from any possible injury to the fibre, the opening and cleaning of high density bales raise certain practical problems, which deserve a little attention. It is well known that, except in the very best grades, baled cotton is generally associated with a certain amount of trash, consisting of dirt, grit, stalk-bits, leaf-bits, seed-coat bits, cut seed, etc., the amount of the trash depending to a small extent upon the variety, but to a larger extent upon clean picking and good ginning. The object of an efficient treatment in the blow-room should be to remove the maximum amount of trash from the lint by causing a minimum amount of damage to the fibre. If the trash is held lightly by the fibre, this object can be achieved without any great difficulty. In this case not only would the yarn spun from the cotton be clean, but also any fabric made from them would better stand the wear and tear of time as there would be fewer abrasions on the surface of the fibre to render it weak and to admit cellulose destroying micro-organisms. If, on the other hand, the trash is held firmly by the fibre it will be necessary to give the cotton a more rigorous treatment in the blow-room, which, in addition to raising the cost of manufacture, may possibly cause some injury to the fibre with the consequent effects mentioned above. Now, in a bale pressed to a high degree of compression the trash becomes firmly embedded in the mass of cotton and its removal is more difficult than in a lightly compressed bale. Their effects will not be appreciable if the cotton is clean or the density of the bale not too high, but when a dirty cotton is compressed into a high density bale its efficient cleaning is a matter of some difficulty.

Three bales of each cotton, viz., P. A. 289F, Surat 1027 A.L.F., Jayawant and Cambodia Co. 2, weighing 400 lb., 300 lb., and 200 lb., respectively, were pressed to the same size and stored for about six months, after which samples for tests were drawn from them. The results of tests on these samples showed that pressing the bales to a density of 20 lb. per cu. ft. might yield slightly better results in a few cases, though the effect is not general and its magnitude, in any case, is very small. The question whether this small improvement in the quality of the yarns is at all compatible with the higher cost of transport, etc., for the low density bales is discussed and the conclusion is drawn that reducing the density of the bale by diminishing the quantity of cotton in it would be an unprofitable step. Furthermore, where the bales are likely to be exported to foreign countries by routes on which the shipping freight

is made on the basis of volume occupied by them, there also a decrease in density would be an uneconomic proposition.

The cottons used in this investigation were good quality types which are usually supplied in a comparatively clean condition. The position, however, may be different for the dirty and leafy cottons and for such cases it would be necessary to undertake another investigation.

COTTON RESEARCH WORK IN INDIA

At a meeting of the Indian Central Cotton Committee held on March 31 last, under the chairmanship of the President, Sir Bryce Burt, the committee approved of the recommendation of the Technological Research Sub-Committee for the purchase of a pilot plant for determining the cost of production of chemical cotton from linters, waste and cheap cotton. Sanction was also provisionally accorded to a scheme for carrying out investigations at the Technological Laboratory for improving the ginning of Indian cottons involving an estimated non-recurring expenditure of Rupees 24,500/- and a recurring charge of Rupees 4,600/- per annum.

A new cotton breeding scheme for the production of long staple cotton for cultivation in Sind at a total cost of Rupees 2,28,700/- over a period of five years was also provisionally sanctioned.

EXTRA-FACTORY COTTON CONSUMPTION IN INDIA

The official cotton statistics should be rendered more accurate by the investigations carried out by the Indian Central Cotton Committee into the extra-factory consumption of cotton in India. The General Report on nine inquiries was recently published.

For many years past a conventional figure of 750,000 bales has been taken as the consumption of cotton for such domestic purposes as hand-spinning, making quilts, mattresses, padded apparel, etc. In tackling the question of the improvement of the accuracy of the All-India Cotton Forecasts the Indian Central Cotton Committee felt that a more reliable estimate of village consumption of cotton in India was essential before the extent of the accuracy of the cotton forecasts could be tested by a comparison with the internal consumption plus exports.

In 1933 the Committee sanctioned nine investigations for estimating the village consumption of cotton in the Punjab, Bombay Presidency, Baroda State, the Central Provinces and Berar, the United Provinces, Madras Presidency, Sind, Hyderabad State and Bihar Province on the basis of actual inquiries in representative villages in each Province or State and the results of these inquiries are summarised in this report. The reports together with the data collected were first examined by the Cotton Forecast Improvement Sub-Committee of the Indian Central Cotton Committee, and the estimates embodied in this consolidated report are those finally approved by the Committee.

All the inquiries were conducted by the Agricultural Departments of the Provinces or States concerned, except in the United Provinces where the inquiry was under the control of the Director of Industries, United Provinces. In each case the cost of the investigation was met by the Committee. The investigators selected were generally either agricultural graduates or graduates in economics or statistics. Representative villages were selected in the first instance in consultation with local revenue officers and subordinates, and a door-to-door inquiry was made by the investigator.

The inquiries have served a most useful purpose in replacing popular ideas by ascertained facts. While no high degree of statistical accuracy is claimed for the results, the inquiry has permitted computation of a more reliable figure for the village consumption of cotton in India than the old conventional figure.

The All-India estimate of 450,000 bales is based on sample inquiries conducted in representative villages and towns in certain Provinces and States and by the application of the conclusions arrived at to the rest of India. The population figures used are those of the 1931 census and no correction has been applied for inter-censal increase in population. The *per capita* consumption or unbaled cotton varies from $3\frac{1}{4}$ lb. per head in the Punjab to $1\frac{1}{4}$ ounces in Madras being highest, as might be expected in the Northern cotton growing provinces. In the United Provinces, the second higher, the average consumption *per capita* is 13 ounces. A further study of the cotton consumption in the Punjab towns, other than in spinning mills, is being undertaken and it is possible that the present estimate may require revision.

(*Indian Textile Journal*)

COST OF RAISING COTTON IN INDIA

The Imperial Council of Agricultural Research has recently published five volumes containing the report on the cost of production of crops in the principal sugar cane, cotton, wheat and jute tracts in India. The data collected has been voluminous and the results arrived at are no less important.

In the case of *desi* cotton the cost per acre including all charges was Rs. 48-7-6 in 1933-34, Rs. 51-4-3 in 1934-35 and Rs. 54-14-6 in 1935-36. The cost per maund including land charges for these three years was Rs. 2-5-5, Rs. 6-14-11 and Rs. 4-13-3 respectively. The above figures show that though the cost per acre in 1934-35 was lower than the cost per acre in 1935-36, the cost per maund in the former year was considerably higher than in the latter year. This was mainly due to the difference in the output per acre which in 1933-34 was 19.8 maunds as compared to 7.2 maunds in 1934-35, and 11.01 maunds in 1935-36. This, therefore, is a case where cost per maund was greatly influenced by the yield per acre, so much so that although cotton prices were higher in 1934-35, that was the only year in which this cultivator made a loss. In the other two years he made a profit, showing that at the price levels of those years cotton cultivation paid with the outturns obtained.

CROP REPORTS

Messrs. Volkart Brothers, Winterthur, Switzerland, report as follows under date of April 13, 1939

We are giving hereafter our latest estimate of the Indian cotton crop 1938-39 and its distribution :—

	1938-39 12/4/39 estimate	1938-39 7/2/39 estimate	1937-38 final
Sind and Punjab Desi	750,000	745,000	1,115,000
Punjab Am. and Sind Am.	1,385,000	1,370,000	1,315,000
United Prov. and Rajputana	330,000	320,000	360,000
Omras	1,366,000	1,442,000	1,816,000
Broach and Surti	585,000	485,000	514,000
Dhollera and Muttia	378,000	357,000	501,000
Comptah and Dharwar	196,000	189,000	149,000
Bombay and Madras Western and Northern	348,000	310,000	190,000
Coconada and Warrangal	38,000	38,000	38,000
Tinnevely and Cambodia	259,000	259,000	377,000
Calcutta	42,000	43,000	47,000
TOTAL CROP	5,677,000	5,558,000	6,422,000
Domestic Consumption	750,000	750,000	750,000
Carryover from old season	1,700,000	1,700,000	1,118,000
TOTAL SUPPLY	8,127,000	8,008,000	8,290,000
Exports to Europe, etc.	1,400,000	1,400,000	1,190,000
" " Japan	1,150,000	1,000,000	932,000
" " China	350,000	250,000	50,000
Indian Mill Takings	2,900,000	2,800,000	3,668,000
Domestic Consumption	750,000	750,000	750,000
TOTAL OFFTAKE	6,550,000	6,200,000	6,590,000
Carryover to new season	1,577,000	1,808,000	1,700,000

Compared with our crop estimate of 7.2.39 the present figure shows a moderate increase which is due to the exceptionally favourable out-turn of the Broach/Surti and Western/Northern crops. As regards the distribution we find that, basing ourselves on exports and Indian mill consumption during the first half of the season, the total yearly offtake is likely to be bigger than estimated in February, even so, however, the undistributed surplus of 1,577,000 bales is only slightly below last year's record carryover.

Cotton markets in India have displayed a remarkable steadiness in the face of the declines registered in New York and particularly in Liverpool since middle of March. Whereas near months in Liverpool have declined over ½d. due to the political situation and the possibility of an export subsidy for American cotton, prices of the main Bombay contracts have remained almost stationary, although an American export subsidy would obviously as well have an adverse effect on prices of Indian cotton. The main reason for the resistance of Indian markets seems to be that a number of big speculators in Bombay carry a considerable long in Broach A/May and seem to be prepared to take up tenders. Even with prices as they are today, the difference between Bombay and Liverpool markets cannot be termed unreasonably narrow. Demand from Europe and Japan has been small of late, but until recently Indian mills have been steady buyers of spot cotton and a steady demand from China continuous.

The import duty on all foreign cotton brought into India has recently been raised from 0.56d. per lb. to 1.12d. per lb. As a result of this increase Indian mills are expected to use more Indian cotton, particularly of good staple, at the expense of foreign cotton and exportation of long staple Indian is likely to be rendered increasingly difficult.

During the 6 months beginning on September 1, 1938, Indian mills have consumed nearly 1,600,000 bales Indian cotton which is a record figure. For the second half of the season prospects are not so favourable owing to a considerably reduced demand and lower prices for yarn and cloth.

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THE CLINGING POWER OF COTTON FIBRES

By K. R. SEN, D.Sc., and N. AHMAD, M.Sc., Ph.D.

(Extracted from Technological Bulletin B 25, "The Clinging Power of Single Cotton Fibres in Relation to their Physical Properties," of the Indian Central Cotton Committee's Technological Laboratory, Matunga, Bombay. Price, 8 annas)

The importance of the clinging power or slipperiness of cotton fibres in drafting and yarn strength is known, and the bulletin describes more detailed investigations using a new apparatus designed with a view to measuring accurately the clinging power of the fibres at different angles of slippage. Very briefly the method was to prepare pads of 100 fibres parallel, two pads being pressed together in the apparatus with finely-adjusted pressure, fibres in the two pads all being parallel. Then a single fibre was drawn between the pads in direction parallel to the pad fibres or at an angle, set at 30° in the experiments, and the slipping force was determined. The number of convolutions per unit length, the ribbon width of the fibre, the wax per unit surface (with or without wax-removing treatments) and the relative humidities of the air (moisture content of fibre) and temperature were observed, and also the results of swelling with 13 per cent. solution of caustic soda. A full account is given of the results and relations between the properties.

CLINGING POWER PROPERTIES

The important conclusions drawn from the data obtained are summarised below :—

(1) The fibres of a coarse cotton possess rougher surface than those of a fine cotton. Beyond a certain limit of coarseness the roughness of surface increases at a greater rate than the coarseness. Inversely, above a certain degree of fineness, roughness of fibre surface alters very slowly.

(2) The extent to which clinging power may be expected to increase with the number of convolutions per inch is largely offset by the irregu-

larity of spacing of the convolutions and the distributions of surface corrugations.

(3) Up to a limit the intrinsic clinging power increases with the amount of wax per unit surface. Beyond this limit it assumes a more or less steady value.

(4) High humidities tend to reduce clinging power. A similar effect is produced by low temperatures. It is probable that these phenomena are caused by alteration in the amount of moisture residing on the fibre surface.

(5) At low pressures between the pads the coefficient of friction generally decreases as pressure is increased. This is probably due to imperfect contact. Good contact is established at a pressure ranging between 5 and 6 cms. of mercury for different cottons; beyond this point the coefficient of friction assumes a fairly steady value.

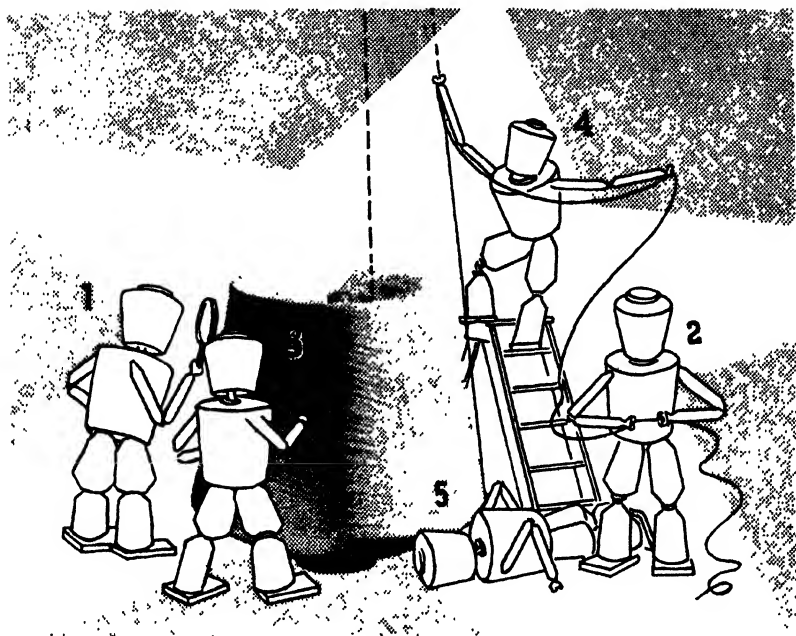
(6) Previous swelling in alkali reduces the clinging power and also renders it less variable.

(7) The clinging power increases significantly when the wax is removed from the fibre. It is highly probable that this increase in clinging power is the action of freshly revealed surface corrugations which were previously hidden under wax deposits.

PRACTICAL EFFECTS

The results above have interesting bearings on several of the industrial processes. One of the factors which would influence the "drafting wave" and evenness of the yarn is the slipperiness of the fibres. If these glide easily and smoothly over one another, comparatively even yarn would be obtained; if, on the other hand, these move hesitantly and jerkily, both the frequency and intensity of the drafting waves would be accentuated. We have found that the clinging power of cotton increases with the lateral pressure exerted on the slipping fibre, and that it is highly probable that this increase would be greater with the finer than with the coarser cottons. Now, in the spinning process the pressure on the roving in the drafting zone is exerted by the weight of the top back and middle rollers. We may therefore expect that, if the respective weights of these rollers exceed certain limits, the yarns would suffer in regularity and consequently in strength, while a certain amount of improvement might be expected by using lighter rollers. The latter conclusion is confirmed in a striking manner by the results obtained by one of us (Ahmad) and described in an earlier bulletin (A 34, 1936). It was found therein that the effect of replacing the ordinary with a heavy back roller is, on the whole, a reduction in yarn strength, and that the adverse effect of using the heavy back roller becomes progressively less as the weight of the middle top roller is reduced up to a minimum of 3 oz., after which there is a reversal of the effect.

The negative correlation of clinging power with relative humidity suggests an interesting possibility. Balls has stated a paradox concerning the spinning of even and strong yarns in the following terms: "Up



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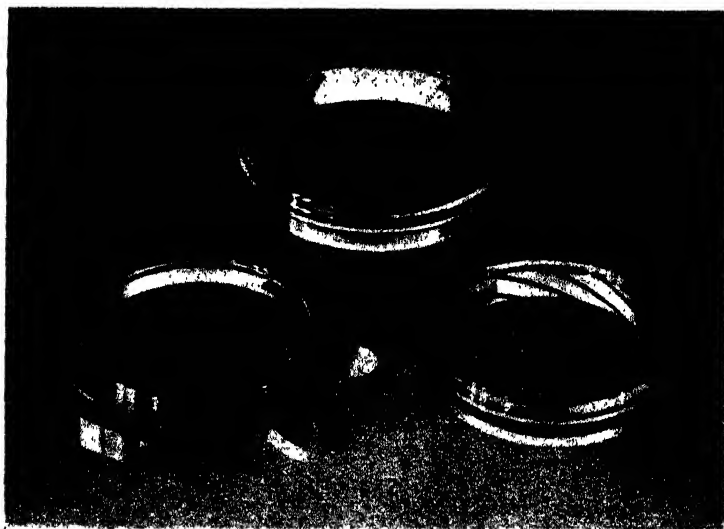
A free bulletin explains the five opportunities Roto-Cones give to improve quality and increase production through more satisfactory delivery on knitting machines.

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to the front mule roller, cotton must be slippery, and afterwards it must be sticky." In actual practice, of course, it is impossible to realise this condition, as the drafting, twisting and winding cannot be spatially separated. However, if the speed frames and the ring frames or the mules are in separate rooms, as is the case very frequently, these two opposite requirements may be achieved to some extent by placing the speed frames where cotton is only drafted, in a somewhat more humid atmosphere than the ring frames or the mules in which both drafting and spinning are carried out simultaneously.

It has been found by us that as wax is progressively removed from the fibres, the clinging power increases at a very high rate. This is due, as we have suggested, to the exposure of surface corrugations which ordinarily remain hidden under wax deposits. Now, we know that some cottons are less waxy than the others, and, therefore, in the case of such cottons lower degree of regularity of yarns would be expected than from cottons possessing a higher wax content, provided this feature is not masked by other more powerful factors.

Finally, our results lead us to utter a word of caution against mixing two cottons which differ considerably in fineness. It has been found that below a certain limit of fineness, the intrinsic tendency of fibres to cling together becomes very great. Hence, if the difference in fineness of the cottons is large, the fibres of the finer cotton would be offered a great deal of resistance in slipping by those of the coarser cottons, and the yarns obtained would be irregular and consequently weak, besides giving rise to bad spinning troubles.

(*Textile Manufacturer*)

THE EFFECT OF EMPLOYING DIFFERENT SPEEDS IN THE DRAW-FRAME ON THE QUALITY OF YARN

Extract from a report prepared by Mr. V. V. Gupte, B.Sc., and Dr. Nazir Ahmad, O.B.E., and published by the Indian Central Cotton Committee Technological Laboratory, Bombay. (*Technological Bulletin*, Series A, No. 47. Price 8 annas.)

Considerable difference of opinion prevails among practical spinners as regards the optimum speeds which should be employed in the draw-frame. The demand for higher production in the ring-frame has often necessitated the use of higher speeds in the preparatory machines, without the benefit of sufficient data on the effect of such speeds on the spinning behaviour of a cotton and the quality of yarns spun from it. The present investigation has, therefore, been undertaken in order to study the effects of employing different speeds in the draw-frame. For this purpose, six Indian cottons, namely P.A. 28qF, Jayawant and Cambodia Co.2 representing the long staple, Wagad and Broach representing the medium staple, and Raman (*desi*) representing the short staple, were selected. The card

sliver of each cotton was collected into six cans which were used throughout in the subsequent tests. Each cotton was given two passages in the draw-frame and four different speeds of the front roller approximating to 320, 370, 425 and 475 r.p.m. were employed. The resulting sliver was spun into suitable counts and the yarns obtained were examined for their physical properties. So far as possible, the hank, draft, twist, etc., were kept the same in all machines for the different slivers prepared from each cotton, the only change in their treatment being the speed of the front roller in the draw-frame. The following conclusions are drawn from a study of the results :—

(1) *Yarn Breakages*.—A distinct trend is noticeable for the breakages in the ring-frame to increase as the speed of the front roller is raised from about 320 r.p.m. to about 420 r.p.m., the effect being more pronounced for the shorter than for the comparatively longer stapled cottons. As the speed is raised further to about 475 r.p.m. there is also a fall in the number of breakages. Thus the breakages show a tendency to increase with roller speed, and the drafting conditions associated with a speed of 475 r.p.m. cause such modifications in the orientation of the fibres in the sliver as are conducive to good spinning behaviour in the ring-frame. Whether this state of affairs would continue with still higher speeds in the draw-frame, and to what limit, would require further investigation.

(2) *Yarn evenness and neppiness*.—The different speeds employed in these tests produced very little effect upon the degree of evenness in the yarns of the same counts spun from a cotton. The same observation applies to the degree of neppiness of the yarns.

(3) *Yarn-strength*.—Within the limits of front roller speeds used in these tests the lea strength does not vary appreciably, especially for the comparatively longer cottons, as the speed of the draw-frame front roller is increased. The increase in production with high speeds is, therefore, not offset by a loss in lea strength, especially with the longer cottons. With relatively shorter cottons a small loss in lea strength is noticeable with higher front roller speeds of the draw-frame, but even with these the highest speed employed showed a small improvement over the middle speeds. Whether this improvement would be maintained with still higher speeds, and to what limit, are questions which can only be answered with a further investigation.

(4) If, instead of lea strength, a quantity known as yarn quality, which takes into account the extension of yarn as well as the dispersion of strength values, is considered, it is found that the best results are given by the slivers which were processed with the lowest speeds, while the poorest results are registered by the slivers which were processed by the two higher speeds. The differences in yarn quality between the lower and the higher speeds are more noticeable for the short than for the relatively long stapled cottons.

It is, however, a moot point whether the sacrifice in production would be compensated for by the improvement in yarn quality brought about by employing low speeds.

FINE PITCH JACQUARD

The following article is extracted from the March issue of the *Textile Recorder* :—

Jacquard machines are made in various sizes, the ordinary British pitch standard machine being about 400, i.e., having 400 needles and controlling 400 warp ends. The Vincenzi pitch is much finer, having 1,320 holes cut into a card about 15 in. \times 2 $\frac{3}{4}$ in. Finer still is the endless paper type jacquard, made by J. T. Hardaker Ltd., Bradford, which has a capacity varying from 896 to 2,688 needles. As distinct from other machines, in the latter type of jacquard, paper rolls are used instead of cards, 896 needles occupying a space of 12 $\frac{5}{8}$ in. \times 1 $\frac{1}{8}$ in. on the paper roll. Another distinctive feature of the machine is that the paper roll does not act directly upon the needles, but upon vertical feelers which control the needles.

The latest type Hardaker fine pitch endless paper jacquard incorporates many refinements, the advantages of which will be appreciated by users, although the fundamental principles remain the same. This jacquard is, of course, eminently suitable for the weaving of fabrics having large repeat designs, for in addition to card saving, the machine itself is compact as compared with the standard type machine, and in many instances can be used to replace two British type jacquards where very wide repeats are required. The machine seen by the writer at the works of J. T. Hardaker Ltd. was a centre shed jacquard with a capacity of 1,760 needles.

The cylinder, as it is termed, is not really a cylinder of the type on standard jacquards, but is stationary. Two circular discs, one at each end of the cylinder, have projections which fit the perforations in the ends of the paper pattern roll, and at each successive pick, the discs turn the paper roll the equivalent of one card. During the time the paper roll is turning, the pressing-off plate, in addition to its reciprocal movement is raised out of the path of the paper, so as to prevent the feelers being bent and the paper roll torn. The feelers fall by gravity on to the paper roll. These feelers actuate the presser needles, which in turn control the ordinary needles of the jacquard itself, which move the hooks in or out of the path of the griffes. Being a centre shed machine, the griffe frame has, of course, a vertical lift.

The jacquard is fitted with a reversing motion, so that should the weaver wish to unweave for some reason, by simply pulling a wire connected to a reversing lever, the jacquard can be turned back to the desired pick. On the other end of the reversing lever is a spring catch or pawl, which, when the weaver pulls the wire connection, pulls round the ratchet wheel secured to the cylinder shaft.

The cylinder discs are actuated by a peg and star wheel picking motion and to prevent the paper roll being turned when the cylinder is in its operative position a safety catch is fitted to the griffe frame. This catch prevents the weaver from depressing the reversing lever and so tearing the cards and bending the feelers.

In some cases it is desirable to have a shed which is deeper at the back to facilitate picking at the loom. The usual method of obtaining an oblique shed is to set the griffe frame at an angle. The "banjo" bracket on the jacquard has a radial slot in which fits a bolt, the adjustment of which enables the requisite angle of the griffe frame to be obtained.

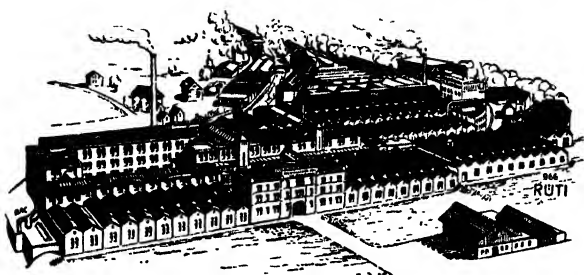
A feature of the Hardaker endless paper fine pitch jacquard is the construction of the press-off frame, which, as mentioned previously, contains the feelers and the press-off needles. This frame can be removed and reassembled within a few seconds, while it can also be adjusted to suit various requirements. The adjustment necessitates the setting of an eccentric, which facilitates a light or heavy lift according to the type of fabric being woven.

The jacquard is driven from the loom by a vertical shaft and bevel gears. A clutch is incorporated on the main driving shaft of the jacquard, so that it may be disengaged should it be necessary to momentarily stop the jacquard.

THE TECHNOLOGICAL PROCESSES OF THE LATEST DRAFTING SYSTEMS

*By Dr. G. Krauter ("Melliand Textilberichte," Heidelberg,
German Edition, 1938, 9, 709).*

The drafting machine may be said to be the most delicate part of the whole process of spinning cotton, but it was long before it received the attention that its importance merits. The author describes the development of the four-roller "pull-through" system from the Jannink drafting system and the original three-roller system with its nip. A particularly great disadvantage of the four-roller system was the rotary movement given to the pull-through roller by the fibre masses. Professor Johannsen solved that problem by means of a grooved roller. Von Trumbach used a transversely grooved roller in which the fibres were laid into the flutings. Casablanca's design of a double-band drafting machine is superior to the roller system, as far as guiding the fibres is concerned. The bottom belt drafting system is another design of recent date. The author discusses chiefly the systems devised by Toenniessen, Klufinger, and Braumuller, referring especially to the lifting of the leather at the turning over of the single-band drafting machine; this bending of the leather brings together special elasticity at the nip of the top roller.



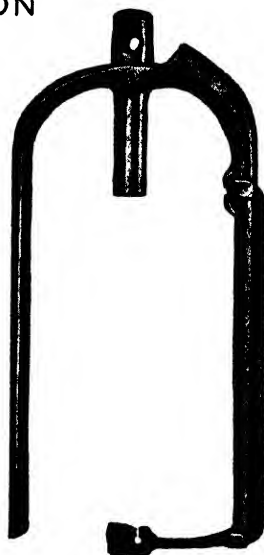
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THE STRENGTH OF COTTON, STAPLE FIBRE AND MIXTURE YARNS AND UTILIZATION OF THEIR SUBSTANCE, PART II

By Dr. O. Schmidhauser ("Melliand Textilberichte," Heidelberg, German Edition, 1937, 11, 856).

The second instalment of this lengthy article deals with the strength of staple fibre and mixture yarns and the utilisation of their substance. Staple fibre yarns behave differently from pure cotton yarns. Staple fibre does not possess a real structure, but is very supple and pliable, and the friction conditions are also different from those obtaining with cotton. Since staple fibre is structureless, even very slight forces or twisting tension suffice to induce the fibres to apply themselves closely to one another and to make the surface friction effective. Generally speaking, the utilisation of the strength and substance of mixture yarns of cotton and staple fibre does not exceed from 35 to 55 per cent. The author comes to the conclusion that the utilisation of the substance represents a factor that is able, in conjunction with the strength of the substance of fibrous material, to afford a certain amount of information about the strength to be expected of the yarn into which it is converted. Better utilisation and therewith better absolute strength figures are to be expected, the better the spinning qualities of the fibres in the mixture yarn are mutually adapted to or complement one another. They should be fairly uniform in staple. The most favourable conditions were arrived at when the length of the staple fibre was a few millimetres shorter than the longest cotton fibres.

SPINDLES AND GYROSCOPES

("Melliand Textilberichte," Heidelberg, German Edition, 1937, 11, 861.)

Erroneous views are often to be met with on the behaviour of modern spindles that are not mounted in bearings and are free to execute a travelling movement. A freely suspended spindle rotates in accordance with the laws of rotation about the axis of its maximum moment of inertia, which does not coincide with that of the spindle stem. Consequently the rotating part of a spindle would revolve about the free axis owing to disturbing forces, if the bearing were not present. The spindle bearing has thus not only the object of absorbing the forces of the bands and tapes, but must also counteract dynamic forces that tend to be greater, the more defective the balancing of the spindle and the bobbin. The damping action of the brake ring spindle, in which fluid friction and mechanical friction co-operate harmoniously, may serve as a model.

WEAVING ELASTIC FABRICS

By J. K. Ebblewhite, A.T.I.

Reprinted from the February issue of the "Silk Journal and Rayon World."

The narrows and broads are by far the most important and constitute the mainstay of the elastic weaving industry. Apart from their width and method of production they are fundamentally the same type of web. Generally speaking, however, the narrows are made with naked rubber threads whilst the broads make use of covered rubber threads. For patterning purposes all the facilities provided by the dobby and small jacquards are exploited and even an adaptation of the leno weave is used, but as a general rule the same fundamental weave basis is used throughout.

The rubber threads are usually drawn into a single shaft working plain (1 & 1). A warp, mostly of cotton, and known as the "binder," is then drawn into two shafts working diaper (2 & 2) to hold the rubber threads. Often a heavier cotton warp, known as the "gut" warp, is worked along with the rubber warp to protect it or to restrict the elongation of the web. The edges of the web require special treatment which usually includes the employment of "edge wires."

The rubber threads are woven in an extended state and the web will contract off the loom to a degree dependent upon the treatment of the materials and the weave, and this contraction will determine the ultimate extensibility of the web. The power or strength of the web will be determined by the size and density of the rubber threads and their extension in the web.

Patterning is largely obtained by floating warp and weft threads of rayon on the face of the web and weft mixing is commonly resorted to. Brace webs are mostly produced from dyed yarns but suspender and broad webs are piece dyed as a rule. Two-way stretch webs are modified broads into which an elastic weft is inserted. They are much more difficult and costly to produce, however.

Elastic broadcloths are the most difficult of all woven elastics to produce and have been the subject of much experiment—and expense. They are usually constructed with rayon and/or cotton warps and an elastic weft. The manipulation of the last-named ingredient constitutes a large obstacle in the production of these cloths. Obviously the introduction of an extensible weft in a fly-shot loom offers many problems. The picking action calls for the application of weft tension to overcome its inertia and causes it to run off the pirn. Naturally, under ordinary circumstances this tension will not be constant with the result that an elastic weft thus treated will exert varying local influences on the resultant cloth producing unsightly deformations.

The solving of this problem is not so easy as one might be led to think; and the following methods of approach are not offered as palliatives.

Firstly by special winding, special shuttle tensioning and freak loom settings the elastic thread *might* be inserted uniformly with a minimum of extension.

By inserting the weft elastic in a fully extended state it is possible to obtain some degree of regularity. One is faced, however, with a considerable loss in cloth width, particularly in weaves of the twill type, and a disturbance of the cloth balance and pattern if any.

A third method, which has been the subject of several patents, suggests that the elastic thread should be wrapped with a non-extensible material to render it non-elastic, such material being soluble to permit of its removal after weaving in a subsequent finishing process. Alternatively the rubber core itself might be rendered rigid temporarily for weaving purposes and made once more elastic after weaving by a suitable chemical reagent.

It is usual to manufacture this type of cloth with weft of elastic thread alone thus introducing a high first cost. If weft mixing is resorted to, by introducing rigid threads like rayon or cotton, then two further considerations arise. If the elastic thread is woven without extension the accompanying rigid threads will restrict the extensibility of the cloth. On the other hand if the elastic thread is woven under tension the cloth will shrink laterally off the loom and the rigid weft threads will need accommodation for their superfluous length. This contingency can be mitigated to some extent by suitable treatment of the weave.

In some types of dress fabrics in which occasional ends of elastic thread are inserted at intervals for special effects, these difficulties do not arise. In fact such treatment would warrant the insertion of these threads warpwise.

The use of large warps of elastic threads on broadcloth looms is a risky undertaking on account of the large wastage entailed and the risk of considerable spoilation in the event of such warps being accidentally cut out by a shuttle.

HIGH-SPEED, AUTOMATIC BOBBIN WINDER

Development of the Electromatic Bobbin Winder No. 99 is announced by Universal Winding Co., Providence, R.I. This new, high-speed, automatic bobbin winder will be shown at the forthcoming Southern Textile Exposition, in Greenville, and at the Knitting Arts Exhibition, in Philadelphia. The machine automatically removes full bobbins and starts winding on empty bobbins without assistance from the operator. The spindle is stopped in approximately two seconds for doffing, loading the new bobbins, and starting—the complete change being done electrically. The machine is equipped with an automatic bunch builder. It runs either regular or reverse, simply by changing the direction of the motor, this change being effected merely by throwing a switch at the head end of the machine.

Stubbs

Patent Quick Traverse Doubler Winder

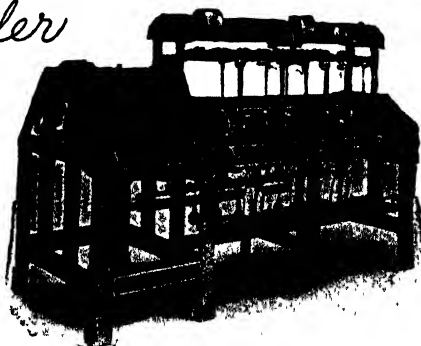
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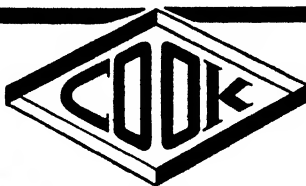
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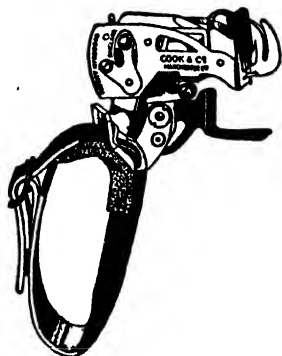
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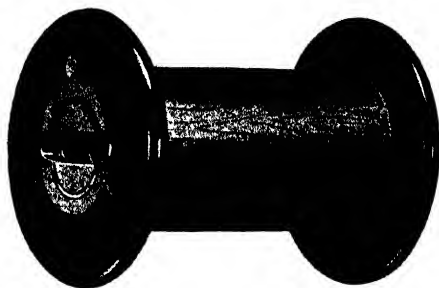


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Units will be available with up to 100 spindles, a 100-spindle machine requiring only a 3 h.p. motor. The winder is two-sided in design, with 50 spindles to a side. In order to simplify the mechanism, two spindles are operated together. Speed of the machine will be approximately two and a half times faster than that of the No. 90 winder, the exact speed depending on the type of yarn and the wind. Floor space required by the Electromatic Bobbin Winder No. 99 is less than half of that taken up by the No. 90 winder. Power required for automatic doffing, loading of new bobbins, and starting of the winding on new bobbins is small, as the power for making the change is on for only $\frac{1}{100}$ th of a second for each of the three or four steps in the complete doffing operation.

The machine requires a large supply package to take full advantage of the automatic features. Due to the small amount of end breakage and the speed at which doffing takes place, the spindles are in operation for a large part of the time. When a change of bobbins takes place, the empty bobbins roll in from the side. Duties of the operator are simply to keep the magazine filled with empty bobbins and to change the cones or supply packages on the winder.

SPINNING RAYON STAPLE

(Reproduced from an article written for the *Textile World*, by Mr. J. L. Brannan.)

Spinning of rayon staple by cotton mills is still in somewhat of an experimental state. While some mills are spinning staple and doing a good job of it, no doubt there are other mills that are having trouble in spinning staple, particularly as regards speeds and settings. Over a period of time, information has been obtained which has given good results with $1\frac{1}{2}$ -denier, $1\frac{1}{2}$ in. viscose staple rayon. This information is outlined below, with the hope that it may be of some help to others who are running this type of fibre or who plan to run it.

Since rayon staple does not require any cleaning, I use only one beater, a carding beater, and run it at a speed of 600 r.p.m., while I run my fans at a speed of 1,000 to 1,100 r.p.m. We were having trouble in pulling pins from the laps, so I tapered the lap pins $\frac{1}{4}$ -in., from the pulling end to the other, and eliminated the trouble. I turned the grid bars upside down and set them as closely as possible, and set the beater $\frac{3}{8}$ in. from the feed roll. With these speeds and settings, running 5,000 to 7,000 lb. of fibre per day in 14 oz. laps, we removed only about $\frac{1}{2}$ -lb. of waste from beneath the picker every two weeks.

On our cards which are 40 in. on the wire, we run a 52-grain sliver. The cylinder diameter is 50 in. and the cylinder speed 165 r.p.m., the doffer diameter is 27 in. and its speed 6 r.p.m. The top flats travel at a speed of 3 in. per minute. The speed of the lickerin is 350 r.p.m. We set the feed plate to the lickerin 0.012 in., lickerin to cylinder 0.007 in.,

and cylinder to doffer 0.007 in. We took out all the mote knives, and set the lickerin to the lickerin screen 0.17 in. at the blank part, and $\frac{1}{16}$ in. at the nose. Cylinder screen settings are as follows : to lickerin 0.022 in. ; to cylinder at centre, as closely as possible without rubbing ; to cylinder at doffer end, $\frac{1}{16}$ in. Top flats are set 0.010 in., doffer comb to doffer is set 0.034 in., and top and bottom front plates and top and bottom back plates are set as closely as possible without rubbing. The cards are run 80 hours a week ; yet fly is removed only once in 14 or 15 days, at the time the cards are stopped for grinding, and we get only $\frac{1}{2}$ to $\frac{3}{4}$ -lb. per card. Two card tenders run 75 yards and do their own stripping.

We have a $1\frac{1}{4}$ in. front roll on our drawing frames, running at a speed of 225 r.p.m. for both breaker and finished drawing. Top rolls are cork covered and set as follows : front to second, $1\frac{3}{8}$ in. ; second to third, $1\frac{3}{4}$ in. ; third to back, $1\frac{5}{8}$ in. The reason for these particular settings is that the fibre in some shipments is $1\frac{9}{16}$ in. long instead of $1\frac{1}{2}$ in. Tenders run 36 deliveries each.

The front roll of the slubbers is $1\frac{1}{4}$ in. in diameter and runs at a speed of 185 r.p.m. Roll settings are : front to middle, $1\frac{1}{8}$ in. ; middle to back, $1\frac{3}{4}$ in. We are making 0.80 hank slubbing, using a twist of 0.75 times the square root of the hank. With this twist it was necessary to cut the spindle speed down to 475 r.p.m. Each slubber tender runs two frames of 76 spindles each.

The intermediates have a $1\frac{1}{4}$ in. front roll, the speed of which is 108 r.p.m. Settings of rolls are the same as those used on the slubbers. Our intermediate roving is 3.00 hank and has a twist of 0.95 times the square root of the hank, which requires a spindle speed of 700 r.p.m. Frame tenders run three frames of 108 spindles each.

We use a 1 in. diameter front roll with a speed of 135 r.p.m. for spinning 30's warp. The frames are the conventional three-roll type and have a jump-saddle light middle roll, with the rolls closed. Calf-skin covered rolls are used. For the 30's warp we use a spindle speed of 8,200 r.p.m., and for filling we use a speed of 6,000 r.p.m. A twist of 3.50 times the square root of the number is used for warp, and twists of 2.75 and 3.00 times the square root of the number for the filling. Our yarn numbers range from 18's to 30's ; we make 18's to 20's from 3.00 hank single roving, and higher numbers from 3.00 hank double roving. I find that I can use longer drafts with rayon than with cotton ; I use drafts of 16 to 17. Assignments made are 12 sides per spinner.





INTERNATIONAL COTTON STATISTICS



The present tabulation is the **FINAL** result of the Census of Cotton Consumption in the Cotton Spinning Mills of the countries making returns for the half-year ended 31st January, 1939, and of Cotton Mill Stocks on that date. It should be borne in mind that the figures published herewith relate to raw cotton only, and do not contain linters or waste cotton of any kind whatsoever. The spindle figures refer to raw cotton spinning spindles only and contain no waste or doubling spindles.

We have again been unable to obtain returns from Spain. Estimates have been prepared for Russia and Spain. Mill Stocks figures for Japan have not been received to date. Our Chinese Association has not been able to collect the usual figures owing to the dislocation of business in Shanghai and an estimate has been made for that country. The figures for Canada are now collected by the Cotton Institute of Canada; for the Argentine by the Junta Nacional del Algodon, the latter being included with "other countries".

The total World Cotton Mill Consumption for the Half-year ended 31st January, 1939, compared with that of the same period of the previous year, is as follows:—

	31st January 1939	31st January 1938	Increase or Decrease over same period in 1938
	bales	bales	bales
American Cotton	5,640,000	5,755,000	— 115,000
East Indian Cotton	2,655,000	3,168,000	— 513,000
Egyptian Cotton	568,000	617,000	— 49,000
Sundries	4,845,000	3,884,000	+ 961,000
All kinds of Cotton	13,708,000	13,424,000	+ 284,000

The total Cotton Mill Stocks on 31st January, 1939 and 1938 in countries reporting, according to continental distribution, were as follows:—

American Cotton :

Europe ..	570,000 bales	against 655,000 bales	on 31st Jan., 1938.
Asia ..	68,000	" "	24,000
America ..	1,659,000	" "	1,782,000

The total Mill Stocks of American Cotton on 31st Jan., 1939, were 2,320,000 bales, as against 2,472,000 bales in the year 1938.

East Indian Cotton :

Europe ..	242,000 bales	against 234,000 bales	on 31st Jan., 1938.
Asia ..	1,047,000	" "	875,000

Altogether the Mill Stocks of East Indian Cotton were 1,317,000 bales against 1,125,000 twelve months ago.

Egyptian Cotton :

Europe ..	170,000 bales <i>against 178,000 bales on 31st Jan., 1938.</i>
Asia ..	25,000 " " 24,000 " " " "
America ..	13,000 " " 18,000 " " " "

The total Mill Stocks of Egyptian Cotton were 228,000 bales against 242,000 bales twelve months ago.

Sundry Cottons :

Europe ..	987,000 bales <i>against 1,026,000 bales on 31st Jan., 1938.</i>
Asia ..	338,000 " " 69,000 " " " "
America ..	184,000 " " 168,000 " " " "

The Total Mill Stocks of all kinds of cotton on Jan. 31st, 1939, in countries reporting, were 5,504,000 bales against 5,256,000 bales on Jan. 31st, 1938.

The World's Total Spindles on Jan. 31st, 1939, showed 146,455,000 as against 147,153,000 in July last.

N. S. PEARSE,
General Secretary.

WORKING HOURS

The hours worked by the firms reporting, when calculated out over the whole industry of each country, indicate the following number of hours worked during the half-year under review. The reader will probably notice that 1,248 hours (*i.e.* six months at 48 hours per week) has been exceeded by many countries. This is, of course, due to the fact that some mills are working two and three shifts and also that, in a few cases, more than 48 hours per week are worked.

	Half-year ending Jan. 31st, 1939	Half-year ending July 31st, 1938
	Average hours worked by the industry.	Average hours worked by the industry.
Great Britain ..	794.53*	787.28
Germany ..	1350.45	1274.07
France ..	902.39	832.66
Italy ..	1451.48	1505.27
Czecho-Slovakia ..	Not available	835.28
Belgium ..	1422.15	1246.53
Poland ..	1617.37	1560.14
Switzerland ..	1240.05	1184.56
Holland ..	1483.81	1549.14
Sweden ..	1521.85	1503.67
Portugal ..	1232.47	1211.35
Finland ..	1297.90	1244.66
Hungary ..	2317.42	1619.67
Yugo-Slavia ..	2670.11	2351.41
Denmark ..	1860.03	1769.83
Norway ..	1229.85	1388.14
Japan ..	No reply	No reply
China ..	No reply	No reply
Canada ..	1364.09	—
Mexico ..	1214.65	1550.29
Brazil ..	1455.35	1258.89

U.S.A. In January, 1939, 22,440,000 spindles were active out of a total of 25,911,000 as compared with 21,916,000 active last July.

* Working hours in the American Section averaged 730.78 (762.05), and those in the Egyptian Section 861.01 (815.38). Firms owning 345,772 spindles in the American Section were completely stopped during the six months. Figures in brackets are for previous half-year.

TOTAL WORLD

Date	Total Estimated Number of Spinning Spindles existing in world	ESTIMATED MILL STOCKS—In thousands of ACTUAL BALES (000's omitted) "INVISIBLE" SUPPLY					Per 1,000 Spindles Total, all kinds of Cotton
		AMERICAN	EAST INDIAN	EGYPTIAN	SUNDRIES	TOTAL	
Feb. 1, 1938	147,219,000	2,472	1,125	242	1,417	5,256	35.70
" 1937	150,960,000	2,772	1,290	263	1,695	6,020	39.88
" 1936*	153,133,000	2,193	959	268	1,225	4,645	30.33
" 1935*	155,157,000	2,084	1,214	281	1,192	4,771	30.77
" 1934	157,718,000	2,873	1,210	244	941	5,268	33.39
" 1933	158,984,000	2,699	832	208	803	4,542	28.57
" 1932	162,070,000	2,775	984	212	637	4,608	28.43
" 1931	163,571,000	2,427	1,212	202	745	4,586	28.04
" 1930	165,143,000	2,742	1,173	224	792	4,931	29.86
" 1929	165,104,000	2,958	1,216	182	938	5,294	32.06
Mar. 1, 1913	142,186,000	3,448	716	279	973	5,416	38.09
Aug. 1, 1938	147,153,000	1,930	1,627	262	1,494	5,313	36.11
" 1937	149,618,000	2,068	1,850	286	1,581	5,785	37.76
" 1936*	151,745,000	1,554	1,577	239	1,234	4,604	29.45
" 1935*	153,778,000	1,651	1,516	258	1,133	4,558	29.64
" 1934	156,878,000	2,307	1,655	272	1,103	5,337	34.02
" 1933	157,755,000	2,558	1,527	235	730	5,050	32.01
" 1932	161,002,000	2,543	1,031	228	660	4,462	27.71
" 1931	162,278,000	1,871	1,565	217	660	4,313	26.58
" 1930	164,108,000	1,985	1,667	237	609	4,498	27.41
" 1929	164,211,000	2,129	1,761	228	745	4,863	29.61
Sept. 1, 1913	143,449,000	1,655	1,405	273	744	4,077	28.42

ESTIMATED COTTON MILL CONSUMPTION—In thousands of ACTUAL BALES (000's omitted)

Half-year ending								
July 31, 1938	147,153,000	5141	2699	571	4258	12669	86.09	
Jan. 31, 1938	147,219,000	5755	3168	617	3884	13424	91.38	
July 31, 1937	149,618,000	6815	3104	682	4536	15137	101.17	
Jan. 31, 1937	150,960,000	6464	2918	591	4610	14583	96.60	
July 31, 1936*	151,745,000	6269	2761	516	3605	13151	86.69	
Jan. 31, 1936*	153,133,000	5954	2716	551	3623	12844	83.88	
July 31, 1935*	153,778,000	5409	2710	563	3519	12201	79.34	
Jan. 31, 1935*	155,157,000	5444	2892	521	3373	12230	78.78	
July 31, 1934	156,878,000	6513	2403	564	3098	12578	80.18	
Jan. 31, 1934	157,718,000	7022	2369	544	2599	12534	79.47	
July 31, 1933	157,755,000	7323	2161	472	2514	12470	79.04	
Jan. 31, 1933	158,984,000	6847	2059	462	2514	11882	74.74	
July 31, 1932	161,002,000	6202	1976	493	2121	10792	67.03	
Jan. 31, 1932	162,070,000	6117	2812	487	2114	11530	71.14	
July 31, 1931	162,278,000	5630	2850	459	2385	11324	69.75	
Jan. 31, 1931	163,571,000	5278	3013	394	2479	11164	68.25	
Year ending Aug. 31, 1913	143,449,000	14630	3977	946	3447	23000	160.34	

* Consumption and stock figures exclusive of Germany.

Estimated COTTON MILL CONSUMPTION
with previous figures for comparison, on basis of Spinners'

COUNTRIES		IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		Jan. 31 1939	July 31 1938	Jan. 31 1938	Jan. 31 1937	Jan. 31 1939	July 31 1938	Jan. 31 1938	Jan. 31 1937
EUROPE :—									
(1)	Great Britain ..	538	542	646	621	157	148	231	202
(2)	‡Germany ..	179	165	148	119	83	65	68	87
(3)	France ..	294	308	313	343	107	100	112	107
(4)	*Russia ..	—	—	—	6	—	—	—	—
(5)	Italy ..	188	210	197	155	35	29	45	27
(6)	Czecho-Slovakia ..	56	105	108	123	5	15	33	35
(7)	Belgium ..	68	73	79	78	63	56	88	84
(8)	*Spain ..	14	1	—	48	—	?	—	12
(9)	Poland ..	93	83	89	97	3	7	4	1
(10)	Switzerland ..	13	12	16	15	4	4	7	6
(11)	Holland ..	46	53	55	41	26	23	25	23
(12)	‡Austria ..	—	—	41	44	—	—	14	14
(13)	Sweden ..	66	48	53	65	—	—	1	1
(14)	Portugal ..	12	13	13	15	1	1	2	2
(15)	Finland ..	26	25	27	25	—	—	—	—
(16)	Hungary ..	26	26	26	30	7	3	5	6
(17)	Yugo-Slavia ..	26	20	22	16	11	11	13	14
(18)	Denmark ..	18	16	16	20	—	—	—	—
(19)	Norway ..	6	5	5	6	—	—	—	—
Europe Total ..		1,669	1,705	1,854	1,867	502	462	648	621
ASIA :									
(1)	India ..	54	42	13	9	1,541	1,515	1,418	1,230
(2)	Japan ..	390	571	650	618	506	651	1,024	978
(3)	*China ..	31	7	40	38	50	30	30	43
Asia Total ..		475	620	703	665	2,097	2,196	2,472	2,251
AMERICA :									
(1)	U.S.A. ..	3,332	2,610	3,005	3,767	19	30	32	39
(2)	Canada ..	120	120	128	144	1	1	1	—
(3)	Mexico ..	—	—	22	—	—	—	—	—
(4)	Brazil ..	—	—	—	—	—	—	—	—
America Total ..		3,452	2,730	3,155	3,911	20	31	33	39
Other Countries ..		44	86	43	21	36	10	15	7
HALF-YEAR'S TOTAL ..		5,640	5,141	5,755	6,464	2,655	2,699	3,168	2,918

‡ Austria included under Germany since July, 1938.

* Estimated.

for the half-year ending 31st January, 1939,
returns made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
Jan. 31 1939	July 31 1938	Jan. 31 1938	Jan. 31 1937	Jan. 31 1939	July 31 1938	Jan. 31 1938	Jan. 31 1937	Jan. 31 1939	July 31 1938	Jan. 31 1938	Jan. 31 1937
148	146	183	184	299	235	369	389	1,142	1,071	1,429	1,396
86	73	60	44	405	319	273	351	753	622	549	601
62	66	64	70	133	94	92	82	596	568	581	602
—	—	—	—	1,350	1,400	1,206	1,129	1,350	1,400	1,206	1,135
43	39	38	26	69	42	47	38	335	320	327	246
10	22	24	25	24	25	40	31	95	167	205	214
4	4	4	5	84	51	58	55	219	184	229	222
3	1	1	16	65	90	84	11	82	92	85	87
13	14	13	17	86	78	48	19	195	182	154	134
20	20	23	21	12	8	14	10	49	44	60	52
2	2	2	2	79	63	64	67	153	141	146	133
—	—	11	10	—	—	26	25	—	—	92	93
4	5	4	3	7	3	5	3	77	56	63	72
3	3	3	2	15	26	27	22	31	43	45	41
1	1	1	1	3	3	3	2	30	29	31	28
6	5	6	6	16	7	14	7	55	41	51	49
4	3	3	4	8	6	6	6	49	40	44	40
—	—	—	—	1	1	1	1	19	17	17	21
—	—	—	—	—	—	1	—	6	5	6	6
409	404	440	436	2,656	2,451	2,378	2,248	5,236	5,022	5,320	5,172
29	30	33	29	184	180	171	146	1,808	1,767	1,635	1,414
39	44	62	44	407	297	371	301	1,342	1,563	2,097	1,941
8	4	4	15	706	614	241	1,197	795	655	315	1,293
76	78	89	88	1,297	1,091	783	1,644	3,945	3,985	4,047	4,648
22	16	22	24	15	13	22	14	3,388	2,669	3,081	3,844
3	2	3	4	1	—	1	—	125	123	133	148
—	1	—	—	86	94	74	102	86	95	96	102
—	—	—	—	365	307	313	353	365	307	313	353
25	19	25	28	467	414	410	469	3,964	3,194	3,623	4,447
58	70	63	39	425	302	313	249	563	468	434	316
568	571	617	591	4,845	4,258	3,884	4,610	13,708	12,669	13,424	14,583

Estimated COTTON MILL STOCKS on comparison on basis of Spinners' returns

COUNTRIES		IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		Jan. 31 1939	July 31 1938	Jan. 31 1938	Jan. 31 1937	Jan. 31 1939	July 31 1938	Jan. 31 1938	Jan. 31 1937
EUROPE :									
(1)	Great Britain ..	91	93	86	61	65	86	59	43
(2)	‡Germany ..	58	42	54	15	33	26	14	19
(3)	France ..	115	116	130	103	56	84	61	57
(4)	*Russia ..	—	—	—	—	—	—	—	—
(5)	Italy ..	84	96	125	64	20	20	20	22
(6)	Czecho-Slovakia ..	34	50	49	36	8	14	12	9
(7)	Belgium ..	29	37	40	29	32	35	34	31
(8)	*Spain ..	3	—	—	—	—	—	—	—
(9)	Poland ..	13	15	8	5	1	1	1	1
(10)	Switzerland ..	19	21	22	20	7	9	8	6
(11)	Holland ..	28	29	41	26	12	16	14	8
(12)	‡Austria ..	—	—	13	11	—	—	2	4
(13)	Sweden ..	29	23	33	21	—	—	—	—
(14)	Portugal ..	3	6	6	2	—	1	—	—
(15)	Finland ..	15	10	12	10	—	—	—	—
(16)	Hungary ..	21	12	14	9	3	3	3	2
(17)	Yugo-Slavia ..	15	4	11	7	5	8	6	10
(18)	Denmark ..	7	6	8	5	—	—	—	—
(19)	Norway ..	6	4	3	4	—	—	—	—
Europe Total ..		570	564	655	428	242	303	234	212
ASIA :									
(1)	India ..	57	59	24	4	1,041	1,308	875	865
(2)	††Japan ..	?	?	?	288	?	?	?	206
(3)	*China ..	11	?	?	10	6	?	?	2
‡Asia Total ..		68	59	24	242	1,047	1,308	875	1,073
AMERICA :									
(1)	U.S.A. ..	1,589	1,224	1,716	2,034	9	9	12	4
(2)	Canada ..	70	59	66	63	1	1	—	—
(3)	Mexico ..	—	—	—	—	—	—	—	—
(4)	Brazil ..	—	—	—	—	—	—	—	—
America Total ..		1,659	1,283	1,782	2,097	10	10	12	4
Other Countries ..		23	24	11	5	18	6	4	1
‡HALF-YEAR'S TOTAL ..		2,320	1,930	2,472	2,772	1,317	1,627	1,125	1,290

* Estimated.

†† The total stocks of raw cotton in Japan amounted on January 31, 1939, to 239,030 running bales.

31st January, 1939, with previous figures for made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
Jan. 31 1939	July 31 1938	Jan. 31 1938	Jan. 31 1937	Jan. 31 1939	July 31 1938	Jan. 31 1938	Jan. 31 1937	Jan. 31 1939	July 31 1938	Jan. 31 1938	Jan. 31 1937
53	54	46	58	98	81	79	72	307	314	270	234
23	25	17	11	150	162	142	45	264	255	227	90
35	42	41	43	87	68	64	51	293	310	296	254
—	—	—	—	414	550	610	415	414	550	610	415
17	19	22	19	46	32	28	15	167	167	195	120
6	11	12	11	11	11	11	8	59	86	84	64
4	4	2	2	50	33	22	29	115	109	98	91
—	—	—	—	15	—	—	—	18	—	—	—
2	4	3	2	23	32	6	3	39	52	18	11
20	20	22	20	13	12	9	9	59	62	61	55
1	2	1	1	50	24	31	41	91	71	87	76
—	—	4	4	—	—	4	8	—	—	23	27
3	4	2	2	5	4	2	1	37	31	37	24
1	1	1	1	8	7	8	8	12	15	15	11
—	1	1	—	1	1	1	1	16	12	14	11
3	3	3	2	11	3	5	3	38	21	25	16
2	1	1	2	5	2	4	5	27	15	22	24
—	—	—	—	—	1	—	—	7	7	8	5
—	—	—	—	—	—	—	—	6	4	3	4
170	191	178	178	987	1,023	1,026	714	1,969	2,081	2,093	1,532
23	26	24	15	97	115	69	35	1,218	1,508	992	919
?	?	?	20	?	?	?	74	?	?	?	528
2	?	?	5	241	?	?	584	260	?	?	601
25	26	24	40	338	115	69	693	1,478	1,508	992	2,048
12	18	17	16	15	9	12	5	1,625	1,260	1,757	2,059
1	2	1	3	1	1	—	—	73	63	67	66
—	2	—	—	31	49	36	25	31	51	36	25
—	—	—	—	137	143	120	102	137	143	120	102
13	22	18	19	184	202	168	132	1,866	1,517	1,980	2,252
20	23	22	26	130	154	154	156	191	207	191	188
228	262	242	263	1,639	1,494	1,417	1,695	5,504	5,313	5,256	6,020

‡ Austria included under Germany since July, 1938.

¶ With exceptions as indicated.

ESTIMATED TOTAL WORLD'S COTTON
years ended 31st Jan., 1939, and 31st July,
the International

COUNTRIES		TOTAL ESTIMATED NUMBER OF SPINNING SPINDLES		MULE SPINDLES	
		Half-year ended		Half-year ended	
		Jan. 31, 1939	July 31, 1938	Jan. 31, 1939	July 31, 1938
EUROPE :					
(1)	Great Britain	36,322	36,879	25,847	26,359
(2)	†Germany	12,967	11,074	3,499	2,858
(3)	France	9,794	9,794	2,303	2,303
(4)	*Russia	10,350	10,050	1,000	1,000
(5)	Italy	5,324	5,350	550	570
(6)	Czecho-Slovakia	1,558	3,330	466	1,205
(7)	Belgium	1,984	1,986	259	264
(8)	*Spain	2,000	2,000	400	400
(9)	Poland	1,764	1,748	404	409
(10)	Switzerland	1,249	1,241	330	341
(11)	Holland	1,241	1,209	253	250
(12)	Sweden	561	557	33	31
(13)	Portugal	444	490	21	130
(14)	Finland	310	310	34	34
(15)	Hungary	317	305	59	59
(16)	Yugo-Slavia	196	184	22	29
(17)	Denmark	103	101	—	—
(18)	Norway	43	43	3	3
Total Europe		86,527	86,651	35,483	36,245
ASIA :					
(1)	India	10,054	9,731	494	544
(2)	Japan	11,502	12,550	6	9
(3)	*China	4,450	4,300	—	—
Total Asia		26,006	26,581	500	553
AMERICA :					
(1)	U.S.A.**	25,911	26,376	213	326
(2)	Canada	1,159	1,137	35	64
(3)	Mexico	884	830	5	5
(4)	Brazil	2,765	2,725	17	17
Total America		30,719	31,068	270	412
Other Countries		3,203	2,853	267	267
Grand Total.. ..		146,455	147,153	36,520	37,477

* No returns received. Estimated figures given for China, Russia and Spain.

** U.S.A.—The division between mule and ring and the number of spindles on Egyptian is only approximate.

SPINNING SPINDLES (000's omitted) for the half-1938, on basis of returns made to Cotton Federation.

RING SPINDLES		SPINDLES SPINNING EGYPTIAN COTTON		SPINDLES IN COURSE OF ERECTION		
Half-year ended		Half-year ended		Half-year ended		
Jan. 31, 1939	July 31, 1938	Jan. 31, 1939	July 31, 1938	Jan. 31, 1939	July 31, 1938	
10,475	10,520	15,345	15,974	9	7	(1)
9,468	8,216	1,433	1,018	—	—	(2)
7,491	7,491	2,211	2,222	51	5	(3)
9,350	9,050	—	—	?	?	(4)
4,774	4,780	800	800	—	—	(5)
1,092	2,125	232	668	—	4	(6)
1,725	1,722	59	55	4	12	(7)
1,600	1,600	—	—	—	?	(8)
1,360	1,339	237	313	42	20	(9)
919	900	775	738	5	20	(10)
988	959	29	18	2	22	(11)
528	526	46	72	1	3	(12)
423	360	75	59	—	—	(13)
276	276	32	28	—	—	(14)
258	246	61	64	1	4	(15)
174	155	29	30	—	12	(16)
103	101	—	—	—	—	(17)
40	40	—	—	—	—	(18)
51,044	50,406	21,364	22,059	115	109	
9,560	9,187	443	479	42	29	(1)
11,496	12,541	1,000	1,000	—	?	(2)
4,450	4,300	—	—	—	—	(3)
25,506	26,028	1,443	1,479	42	29	
25,698	26,050	1,000	1,000	?	?	(1)
1,124	1,073	48	28	1	17	(2)
879	825	—	7	—	—	(3)
2,748	2,708	—	—	28	7	(4)
30,449	30,656	1,048	1,035	29	24	
2,936	2,586	458	491	30	34	
109,935	109,676	24,313	25,064	215	196	

‡ Includes Austria since July, 1938.

SPECIFICATION OF PART OF THE COTTON RETURNED AS "SUNDRIES" (IN ACTUAL BALES)
Six Months ending January 31st, 1939, estimated from Actual Returns

CONSUMPTION

Country	Peru- vian	Brazil- ian	Argen- tine	West Indian	Mexi- can	Turk- ish	Rus- sian	Iraq	Sudan	East African	†West African	South African	Chinese guay	Others	Total
Great Britain ..	46,126	109,907	3,871	5,411	3,266	—	410	226	80,915	14,433	15,422	331	47	1,074	298,877
Germany ..	—	59,552	856	105	—	—	769	—	10,418	—	26,553	—	—	405,348*	405,348
France ..	2,959	28,934	—	—	5,069	18,557	—	—	3,416	774	67,242	—	—	31,583	133,345
Belgium ..	3,441	8,964	4	—	—	1,197	—	—	4,369	1,156	4,391	—	—	2,942	18,436
Switzerland ..	1,191	386	—	—	78	—	—	—	7,014	37	48,476	249	—	4,113	54,372
Poland ..	6,394	20,524	—	229	211	1,405	1,146	—	686	149	16,127	555	—	535	11,567
Holland ..	2,892	9,652	—	—	—	1,604	22	—	—	37	66,565	—	—	904	86,222
Czechoslovakia ..	358	2,700	—	—	576	—	—	—	—	1,526	278	—	—	—	79,315
Sweden ..	—	4,768	—	—	—	—	—	—	—	—	—	—	—	—	23,760
China ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	6,562
Brazil ..	—	364,837	—	—	—	—	—	—	—	—	—	—	—	—	706,000
Mexico ..	—	—	—	—	85,627	—	—	—	—	—	—	—	—	—	364,837
Japan ..	—	244,189	—	—	—	—	—	—	—	20,260	—	—	—	—	85,627
Hungary ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
India ..	110	1	1	2,570	—	9	—	11	30,843	139,057	3,291	7,020	—	—	406,826
Total ..	63,695	845,939	4,758	8,315	94,827	22,799	13,505	237	138,588	177,434	256,957	8,155	316,963	4,090	2,961,454

STOCKS

Country	Great Britain ..	Germany ..	France ..	Italy ..	Belgium ..	Switzerland ..	Poland ..	Holland ..	Czechoslovakia ..	Sweden ..	China ..	Brazil ..	Hungary ..	India ..	Total
Great Britain ..	12,849	19,307	976	3,586	424	—	2,339	463	49,892	4,288	2,036	85	—	192	97,869
Germany ..	—	23,655	290	62	—	—	—	—	13,746	—	27,490	—	—	—	149,800*
France ..	2,562	7,997	11	—	1,649	13,341	—	—	3,223	4,288	—	—	—	18,424	36,413
Italy ..	—	4,956	29	—	—	—	—	—	446	40,109	—	—	—	1,255	45,839
Belgium ..	2,427	632	—	—	—	—	—	—	3,300	1,045	6,625	—	—	2,349	50,316
Switzerland ..	1,853	3,125	—	—	11	694	3,435	—	598	13,648	48	—	—	105	13,466
Poland ..	1,503	4,797	—	28	—	—	15	—	12	42,075	—	—	—	—	23,186
Holland ..	3,064	1,373	—	—	60	788	254	497	218	7,250	110	—	—	209	50,096
Czechoslovakia ..	223	3,364	—	—	—	—	—	—	—	1,516	—	—	—	—	11,374
Sweden ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	24,728
China ..	—	187,374	—	—	—	—	—	—	—	—	—	—	—	—	187,374
Brazil ..	—	—	—	—	31,319	—	—	—	—	—	—	—	—	—	31,319
Hungary ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
India ..	—	136	—	1,085	—	—	—	—	—	65,357	1,237	4,392	—	763	11,012
Total ..	24,531	206,736	1,306	4,761	33,462	15,007	6,160	463	95,076	73,700	146,374	4,625	241,002	1,656	1,081,256

Bale Weights (Gross) in lbs.: Peru 490, Brazil 396, Argentine 500, West Indian 500, Mexico 500, Russian 396, Iraq 413, Sudan 450, E. Africa 410, W. Africa 414
 S. Africa 500, Australia 511, Chinese 520, Paraguay 462, Turkey 460.

* Unspecified.
 † Including Congo bales weighing about 185 lbs. gross.

STAPLE FIBRE CONSUMPTION

The following figures show the consumption of cut Rayon or Artificial Silk Staple Fibre *by the cotton spinning industry* in certain specified countries, during the half-year ending January 31, 1939, and the number of spindles engaged in the production of such yarns :—

Country	No. of Spindles producing Artificial Silk Yarn	Quantity of Artificial Silk Staple Fibre Spun (in lbs.)
Great Britain	475,879	6,381,442
France	52,536	1,328,767
Germany	*	115,300,580
Sweden	21,234	1,228,837
Poland	109,467	7,830,106
Holland	17,902	802,970
Hungary	—	1,553,925
Other Countries	36,914	1,559,376
Czecho-Slovakia	28,992	933,390

* A large proportion of the staple fibre used in Germany is used in conjunction with cotton. In consequence, it is impossible to give the number of spindles engaged upon the production of artificial silk yarn exclusively.

Countries listed under "Other Countries" include Switzerland, Finland, Norway, Denmark, Canada. This has been done in order to avoid disclosure of the activities of individual firms.

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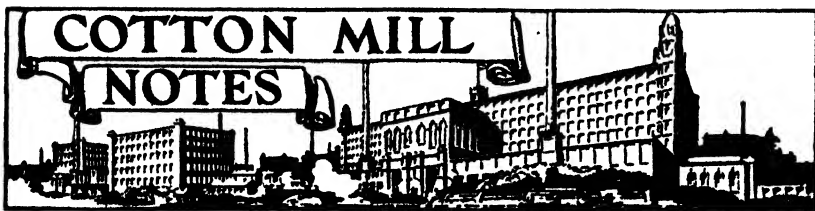
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A SURVEY OF THE MEXICAN INDUSTRY

(Specially contributed by Curtis Vinson.)

For the past year, Mexico's cotton textile industry, together with the country's rayon, silk and wool plants, has struggled under severe economic obstacles.

Labour troubles, increased taxes and diminished purchasing power on the part of the great mass of consumers of cheaper products have made themselves felt throughout the entire structure of the business.

With these conditions have come certain retrenchments, a general curtailment of overhead wherever possible and a careful weighing of plans for the future.

Due to Mexico's stringent labour laws for the safeguarding of the workers' interests, labour has suffered in less ratio than the management, though labour has had to make some concessions in the way of a shortened working week in order to permit the industry sufficient margin to keep the plants operating.

Indications are that 1939 will call for continued careful management in order to keep the industry functioning with any profit to the investors. What relief from the Government in the way of lessened taxes may be expected is problematical. Under the current Mexican political ideology, the welfare of the worker is paramount. It seems safe to assume that sympathy for capital will be expressed only to that extent necessary to keep the workers on the pay roll and to make possible the meeting of governmental revenue demands.

Major hurdles that the textile industry found in its path in 1938 included long-drawn-out wage controversy with the workers that reached its climax about the time of the oil expropriation in March, increase in tax on raw cotton to 7 pesos per 100 lbs. and a marked drop in the purchasing power of the domestic market, on which the Mexican industry depends almost solely, by reason of general disturbed economic conditions in the country.

Increased wage demands, dating back to 1937, had put the industry in a serious predicament in view of the uncertain economic conditions prevailing in the wake of the oil expropriation. No collective contract between the workers and the industry as a whole existed, only agreements between the individual mills and their employees.

An agreement, however, for a five and a half day week was reached. But the mills claimed that it was becoming more and more difficult to operate even under such an arrangement.

Following the oil expropriation, some of the mills voluntarily offered some wage increases and renewed efforts to adjust the situation equitably for both the mills and the workers were made. Faced by troublesome conditions after the oil expropriation, the Government urged speedy and amicable settlement of the controversy. Co-operation, under this spur, became the keynote of discussions. The mills, citing wage increases granted, asked for a shortening of the work-week to three days. The workers met this request by accepting a four-day week. Factories in the Puebla district, a major spinning and weaving region, were authorised provisionally to reduce the number of their workers, though only after considerable debate with the union leaders.

Adding to the troubles of the mills was the sudden drop in the purchase of coarse white cotton cloth that is manufactured in great quantities for clothing of the rural peons. This fabric carries a heavy load of the cotton textile industry, being used extensively throughout the country in clothing of the lower classes.

When the Government tax on raw cotton, which the domestic mills must pay, was raised to 7 pesos on 46 kilos, effective June 30, 1938, the mills had no alternative except to increase the price of their products. This tax applied not only to all cotton produced after June 30, but to cotton produced previously and delivered to the factories after that date.

With the increase in prices that the mills announced, a marked drop in general consumption of cotton goods was registered. Stock rooms of the mills filled up with slow moving products and the industry's difficulties grew more and more pronounced.

There was, of course, a general protest on the part of the industry which claimed taxes were already too high for profitable enterprise even before the increase of the cotton tax to 7 pesos on 46 kilos, or about 100 lbs.

There was the cry that artificial price raising had been resorted to to protect the cotton growers in the Laguna area where the Government had invested heavily in its communal cotton production plan. Such price raising tended to increase importation of cotton from the United States, Egypt and other countries, it was declared.

The Government was asked that "if high prices within the country must be maintained, an effort be made to exclude foreign cotton so that Mexicans may use only the Mexican product."

Protest was also made against lack of credit from the banks "when the industry needs it most." This, it was pointed out, had forced many textile plants to slow down operations, causing accumulation of unused cotton in the warehouses. The Government was asked to suppress the special taxes on cotton, especially the 7 pesos tax on the 100 lbs. This latter tax was declared unconstitutional since "it aggravates conditions of one line of business, favouring others."

While generally airing the complaint of the industry, these protests produced small material relief. The industry, in consequence, tightened its belt, pruned expenses wherever possible, and set itself to the practice of rigid economy. How it will weather the current year depends to a large extent upon the growth of easier conditions in the nation as a whole.

Some difficulty is also being experienced due to a shortage in the 1938 cotton crop over than of 1937. The margin between requirements of the Mexican mills and exportation has been rather close so far as the 1938 crop was concerned. As late as November, 1938, exports totalled almost 70,000 bales out of the production of about 245,000 bales (estimate) for the 1938 season. The requirements of the Mexican mills from the 1938 crop were estimated at around 170,000 bales. For the year ended June 30, 1938, domestic consumption was 240,000 bales.

Adding to the difficulties of the general situation so far as the Mexican mills are concerned is the price at which the Government permits delivery to domestic mills. This is from 20 per cent. to 30 per cent. above the world price of cotton.

Indications are that the 1939 cotton crop will be larger than that of 1938. The production in 1937 was about 330,000 bales, a drop of about 54,000 bales from 1936. The drop in the 1938 crop from the 1937 yield was about 90,000 bales.

By reason of workers employed and value of output, the cotton textile industry is perhaps Mexico's major manufacturing industry. Governmental statistics show that for 1937, cotton spinning and weaving mills in the country numbered 184. These mills employed a total of 43,300 workers, divided as follows: Men, 16 years or over, 37,856; women, 16 years or over, 4,531; men under 16 years, 911; women under 16 years, 2.

The mills averaged 278 days of operation during the year for a total of 657,601 hours of work. Salaries paid totalled 44,604,268 pesos. (For 1937 the peso averaged a ratio of 3.60 to one U.S. dollar.)

The chief centres of the industry are in the state of Puebla, with 63 mills, employing 12,725 workers; the state of Vera Cruz, with 10 mills, employing 7,041 workers; and the Federal District, with 47 mills, employing 6,129 workers. The remainder of the mills are scattered over fifteen states.

Distribution of the industry by states is shown in the following governmental survey for 1937:—

TABLE I
MEXICAN COTTON TEXTILE INDUSTRY
(Spinning and Weaving)

MILLS, WORKERS, TIME WORKED AND SALARIES PAID—1937

By States	No. Mills	Total	Workers Employed				Time Worked		Salaries Paid Pesos
			16 yrs. or over	Men	Women	Under 16 yrs.	Av. days	Hours	
All States ..	184	43,300	37,856	4,531	911	2	278	657,601	44,604,268
Coahuila ..	8	3,325	2,602	711	12		297	34,033	3,093,662
Chihuahua ..	3	498	433	65			300	11,467	456,234
Federal District ..	47	6,129	5,100	1,001	28		290	171,685	6,268,467
Guanajuato ..	7	1,132	979	151		2	289	26,692	1,342,007
Jalisco ..	9	2,896	1,822	1,074			290	22,665	2,691,315
Mexico ..	11	2,704	2,474	144	86		262	36,785	2,241,109
Nuevo Leon ..	3	1,252	860	378	14		299	14,936	933,305
Puebla ..	63	12,725	12,233	122	370		272	238,058	14,287,945
Queretaro ..	5	1,275	1,022	242	11		205	13,604	874,987
Tlaxcala ..	8	2,125	2,125				300	20,642	2,174,600
Vera Cruz ..	10	7,041	6,485	214	342		261	30,278	8,455,834
Durango (2) and Sonora (1) ..	3	478	391	87			223	7,393	376,895
Michoacan (2) and Hidalgo (1) ..	3	660	548	80	41		293	9,008	618,439
Nayarit (2), Sinaloa (1) and Oaxaca (1) ..	4	1,051	782	262	7		293	11,355	789,469

Statistics from the Secretariat of National Economy.

The number of cotton mills has remained rather constant since 1935. That year the Government listed 185. This number jumped to 188 in 1936, then fell to 184 in 1937. Government figures in 1938 placed the number of mills at 205, but this is probably accounted for by the inclusion of certain plants that spin and weave both cotton and other yarns.

Production value jumped from 137,843,615 pesos in 1935 to 167,858,757 pesos in 1937. The pesos maintained a constant ratio during those years, generally speaking, of 3.60 to the U.S. dollar.

The following governmental figures show the status of the industry through the three years ending with 1937:—

TABLE II
MEXICAN COTTON TEXTILE INDUSTRY
(SPINNING AND WEAVING)

	1935	1936	1937
Number of mills	185	188	184
Workers employed	40,586	43,096	43,300
Hours worked by mills ..	654,828	659,375	657,601
Total of salaries paid ..	35,027,670	42,421,052	44,604,268 (Pesos)
Value of principal domestic raw materials consumed	68,104,179	71,386,670	78,039,702 (Pesos)
Value of principal imported raw materials consumed	3,944,057	5,184,342	5,994,899 (Pesos)
Value of production	137,843,615	155,814,671	167,858,757 (Pesos)

The above figures are for plants with an annual production of more than 10,000 pesos in value. Statistics from the Secretariat of National Economy.

Production by fabrics and values during 1935, 1936 and 1937 of the Mexican cotton textile industry are shown in the following table:—

TABLE III
PRODUCTION AND VALUES BY FABRICS

Product	1935	1936	1937
Muslin (in thousands of metres)	145,845	—	—
Unbleached muslin (in thousands of metres) ..	—	126,436	134,745
Bleached muslin (in thousands of metres) ..	—	53,726	56,520
Calicoes (in thousands of metres)	26,975	25,508	19,072
Percales (in thousands of metres)	70,398	58,969	56,051
Flannels (in thousands of metres)	6,189	9,471	9,574
Vichy, Oxford, etc. (in thousands of metres) ..	52,263	48,522	47,870
Drills (in thousands of metres)	21,991	21,992	25,638
Tweeds (in thousands of metres)	18,305	18,696	22,272
Coverlets (in thousands of pieces)	—	164	214
Yarn and threads (tons)	7,136	7,618	7,336
TOTAL VALUE OF PRODUCTION (in thousands of pesos)			
Muslin	137,844	155,815	167,859
Unbleached muslin	31,928	—	—
Bleached muslin	—	29,058	33,706
Calicoes	—	13,048	14,177
Percales	8,223	7,802	5,793
Flannels	19,571	17,374	17,906
Vichy, Oxford, etc.	2,658	4,476	5,014
Drills	12,747	12,388	13,997
Tweeds	11,224	11,842	13,697
Coverlets	8,488	9,255	12,277
Yarn and threads	—	685	994
Other materials	14,130	15,974	17,192
	28,877	33,913	33,106

Statistics from "Statistical Review," published by Government Department of Press and Publicity, for December 1938.

Raw materials used by the textile industry, including cotton, cotton yarn and rayon yarn, and the values, are shown in the following table for the three years ending with 1937 :—

TABLE IV
RAW MATERIALS MANUFACTURED

	1935	1936 (In tons)	1937
Cotton	48,381	51,450	52,921
Domestic	48,204	51,267	52,704
Imported	177	183	217
Cotton Yarn (Hilaza de algodón)	4,514	6,019	4,898
Domestic	4,499	5,999	4,872
Imported	15	20	26
Rayon Yarn (Hilaza de artisela)	—	493	439
Domestic	—	227	158
Imported	—	266	281

Statistics from "Statistical Review," published by Government Department of Press and Publicity, for December 1938.

Investment in the Mexican cotton textile industry is reliably estimated at 106,000,000 pesos.

A summary of the 1938 directory, issued by the Government, of textile plants of the country, including cotton, rayon, wool, silk, finished products and knitted products, shows the following division, with spindles, looms and knitting machines :—

COTTON : Spinning mills 32, with 57,094 spindles ; spinning and weaving mills 98, with 770,224 spindles and 29,424 looms ; weaving mills 44, with 397 looms.

COTTON AND RAYON : Spinning and weaving mills 12, with 52,400 spindles and 2,190 looms ; weaving mills 34, with 599 looms.

COTTON AND WOOL : Spinning and weaving mills 7, with 19,956 spindles and 514 looms.

WOOL : Spinning and weaving mills 30, with 44,439 spindles and 1,119 looms.

FINISHED PRODUCTS : Seven mills, with 11,568 spindles and 504 looms.

KNITTED PRODUCTS, COTTON (Underwear, Socks, etc.) : 107 mills, with 4,048 spindles, and 1,202 knitting machines.

KNITTED PRODUCTS, COTTON, RAYON, WOOL AND SILK : 144 mills, with 18 looms and 2,927 knitting machines.

RAYON : Weaving mills 147, with 2,921 looms.

KNITTED PRODUCTS, RAYON, SILK AND WOOL : 21 mills, with 161 knitting machines.

SPINNING, WEAVING AND KNITTED PRODUCTS : 9 mills, with 24,364 spindles, 402 looms and 1,616 knitting machines.

PREPARATION, RAYON AND SILK YARN : 1 mill.

The summary shows a total of 174 cotton spinning and weaving mills, with 827,318 spindles and 29,821 looms.

The total of mills listed by the summary, including cotton, rayon, wool, silk, finished products and knitted products, is 692, with a total of 984,093 spindles, 38,088 looms and 5,906 knitting machines.

Mexico's importation of cotton cloth for the January-July, 1938,

period was valued at 3,732,492 pesos as compared to 4,389,719 pesos for similar period in 1937. During the same period in 1938 Mexico exported cotton valued at 11,089,381 pesos as compared to 8,239,550 pesos during similar period in 1937 and cotton cloth valued at 3,108 pesos as compared with 6,665 pesos for similar period in 1937.

Cotton exported by Mexico during the January-July, 1938, period included: to Great Britain 1,221,487 pesos in value; to the United States 4,718,691 pesos in value; to Germany 1,297,829 pesos in value; to Italy 2,083,026 pesos in value.

Imports by Mexico during the January-July, 1938, period from Great Britain included: Cotton yarn, 3,237,062 pesos in value; cotton cloth, 989,314 pesos in value.

In presenting statistics on the Mexican textile industry, including cotton, rayon, wool and silk, it should be pointed out that the Government figures take in only plants with an annual production of more than 10,000 pesos in value.

In the spinning of wool particularly, numerous small home operated looms are to be found throughout the country, these making up the business of the Indian artisans who, all told, turn out thousands of sarapes or blankets and other weaves annually. It is wellnigh impossible to make a survey of these hand looms or the volume of their production.

While cotton production has suffered in volume of yield in Mexico during the past two years or so, the Government's agrarian programme calls for increased acreage in cotton in the future. Plenty of seed are available for the 1939 plantings and improved quality as well as larger volume of production are forecast for the current year's crop.

The following table shows cotton production in the country during the thirteen year period ending with 1937:—

TABLE V
MEXICAN COTTON PRODUCTION AND EXPORTS.

Year	Hectares harvested	Yield in tons	Value of crop, in 000s of pesos	Yield per hectare in kg.	Rural price in centavos per kg.	EXPORTS	
						Tons	Value in 000's of pesos
1925 ..	171,929	43,467	44,278	253	101.86	11,914	8,477
1926 ..	248,184	78,016	61,045	314	78.24	28,147	21,594
1927 ..	132,041	38,862	40,838	294	105.08	25,620	16,372
1928 ..	203,243	60,376	61,430	297	101.74	22,510	16,480
1929 ..	198,388	53,344	41,701	268	78.17	16,821	12,926
1930 ..	157,944	38,487	23,250	243	60.41	2,984	2,111
1931 ..	129,114	45,681	21,848	353	47.93	11,104	4,865
1932 ..	77,854	22,015	13,807	283	62.17	3,946	1,602
1933 ..	171,707	56,465	45,269	329	80.17	1,378	479
1934 ..	169,123	48,345	44,806	266	92.67	3,515	3,252
1935 ..	242,283	54,319	43,969	224	80.95	26,670	18,802
1936 ..	341,573	85,709	80,243	251	93.62	52,107	46,364
1937 ..	335,630	73,727	—	220	—	9,405	8,383

Export figures included raw cotton, with and without seed.

Statistics from "Statistical Review," for January 1939, published by the Mexican Department of Press and Publicity.

THE COTTON INDUSTRY IN TURKEY

The textile industry in Turkey received an important impetus by the action of the present regime in establishing state controlled cotton and woollen mills a few years ago, the chief object being to make the

country independent of imports of cotton goods and at the same time to utilise the cotton production in Turkey.

The most important section of the Turkish textile industry is the cotton spinning and weaving section and the mills controlled by the state have installed in them more than two thirds of the spindles and looms.

The chief mills are as follows :—

[a] State Owned Mills			Spindles	Looms
Kombinat Kayseri	..	..	33,000	1,080
„ Eregli-Konya	..	..	15,200	300
„ Nazilli	..	..	29,500	768
„ Malatya	..	..	25,000	700*
Bakirköi Cotton Factory	..	..	8,000	360
			<hr/> 110,700	<hr/> 3,208
[b] Privately Owned Mills			Spindles	Looms
Milli Mensucat Adana	..	..	12,000†	400
Pamuk ve Bes Fabr. Adana	..	..	8,000	200
Tschukurova, Tarsus	..	..	10,000‡	300
Rasim Bey & Bostandi, Tarsus	..	..	8,000	—
Yapa, Mersin	..	..	5,000	—
Two mills in Gazi and Antep	..	..
[together]	..	..	10,000	—
			<hr/> 53,000	<hr/> 900

* Commenced working February, 1939.

† Spindles will be increased to 22,000.

‡ Number of spindles will be doubled.

As will be seen from the above tabulation, the State and large privately owned mills control 163,000 spindles (shortly to be raised to 183,000), and 4,100 looms. This equipment has a daily output of 80,000–100,000 metres of cloth ; this figure, however, does not include the production on hand looms in the neighbourhood of the Black Sea, which used to be an important industry but is now declining year by year as competition from the industry increases. It has been estimated that the number of hand looms is from 5,000–8,000, with a daily production of 15 metres per loom. The State mills, situated at Eregli and Nazilli, have specialised on finer qualities of printed goods competing especially with the products of the hand weaving industry, which, however, use the very cheapest dye stuffs, whereas the Chinese hand loom industry, which is in a very flourishing state, uses only the very best and the dearest.

The end of this industrial expansion is not yet in sight, although for the moment the building of new mills has not been undertaken. There appears to be a shortage of skilled personnel and at the same time a lack of competition between the mills. As an example of high prices, blue cotton serge of a certain quality and of Italian origin sells at 70 piasters, including, of course, freight, duty and handling charges, whereas the cost of production only of the same quality in Turkish mills amounts to 80 piasters.

(*Textil Zeitung*, Berlin)

DUST IN LANCASHIRE CARDROOMS

For many years past much space has been devoted in these columns to this question which has long been engaging the attention of cotton employers' and operatives' representatives in Great Britain. A British Government report has now been issued (published by H.M. Stationery Office, price 6d. net) by the Departmental Committee on Compensation for Cardroom Workers, appointed to consider whether an equitable and workable scheme could be devised for compensating disabled workers. The report surveys the difficulties of deciding whether the degree of respiratory illness is due to the occupation, and how far, and whether it could be brought under the Workmen's Compensation Act as an "accident," or scheduled as an industrial disease, like silicosis in asbestos and other workers, or miners' nystagmus. A considerable amount of medical, statistical, and scientific work has been done on the problem in the last ten years, and to a very large extent the problem may almost cease to exist by reason of the technical improvements in removing the dust, leaving the atmosphere clean, and also by detecting those recruits to the work, say, 5 per cent. or so, who would be susceptible to respiratory illness under the conditions. It has been found that it is only a small fraction of the dust which causes the irritating action, and only on certain persons, the harmful substance being histamine or possibly some protein fraction. The statistics show that it is only the male cotton, blowing, and cardroom operatives of long-standing service who suffer excess respiratory illness.

The committee reach the view that it is possible to make provision for the class of case in which the operative has been unable to claim Workmen's Compensation. The respiratory disease can now be recognised and is described by the name "byssinosis." The recommendations are confined to male workers who have become totally incapacitated after twenty years' employment and have not left it more than twelve months previously. There should be an Administrative Board of three, and a Medical Board of two or three to examine claims, and the general procedure would be as for Workmen's Compensation claims for industrial disease. The funds for older workers might be provided by a levy, say, 2s. 3d. per card, or on the basis of wages paid. The committee has not felt compelled to consider the questions of medically testing young workers for suitability, or that of preventative suspension of workers, but the questions are discussed.

(Textile Manufacturer)

PAYMENT FOR OVERTIME IN ITALY

The Royal Decree Law, dated May 29, 1937, by which the normal duration of work in industrial undertakings in Italy is declared to be 40 hours a week, provides that, when working time exceeds 40 hours but does not exceed 48 hours a week, the employer shall pay to the Special

Unemployment Fund a contribution equal to 10 per cent. of the remuneration (at the ordinary wage rate) due to the worker for hours of work in excess of 40 a week, unless collective agreements exist which require the payment of increased wage rates for such overtime. For hours worked in excess of 48 a week, overtime rates are in all cases to be paid in accordance with the requirements of collective agreements. On November 10, 1938, an agreement was concluded between the Confederations of industrial employers and workers in Italy, in accordance with which, ordinary wage rates are to be increased by 10 per cent. in respect of all working time which exceeds the normal weekly hours of work, but does not exceed 48 hours a week, except when individual collective agreements prescribe more favourable terms. This agreement took effect on February 27, 1939.

(British Ministry of Labour Gazette)

THE COTTON INDUSTRY OF U.S.S.R.

Actual output in 1938, in the Soviet Union, fell behind planned levels, as a result of considerable disorganisation in the cotton-textile industry.

According to a recent press report, 520,000 spindles are to be installed in 1939, or, it is stated, 50 per cent. more than last year. While previous reports indicated that the 1938 plan provided for an installation of 500,000 spindles, it would appear that the plan was not fulfilled; actual installation during 1938 presumably totalled about 330,000 spindles.

The former Commissariat of Light Industry, which was in charge of the textile industry, among others, was reorganised at the beginning of January, 1939, and a separate commissariat in charge of the textile industry was established. The hope is expressed that, with this administrative decentralisation accomplished, the problem of the textile industry will be more adequately dealt with in the future.

The textile industry, like all others in the Soviet Union, is affected by new, stringent labour regulations aiming to reduce the large labour turnover and tighten factory discipline.

(Foreign Crops and Markets)

PROPOSED COMPREHENSIVE YARN PRICE AGREEMENT FOR AMERICAN SECTION IN LANCASHIRE

The following is extracted from the *Textile Weekly* of Manchester, dated April 14, 1939 :—

A comprehensive yarn price agreement for the American section of the cotton spinning industry has been issued to spinners this week. This agreement has been drawn up by a temporary committee, consisting of the chairman and vice-chairman of the various American yarn price agreements, with the assistance of Messrs. John Taylor & Co., solicitors.

Mr. Frank Platt is the chairman of the committee and Mr. Wentworth Schofield the secretary.

The agreement is set out in a 24-page brochure, and is accompanied by a "Spindles particulars form" on which all spinners of American-type yarns are invited to state whether they approve of the terms of the agreement, and whether they will be prepared to sign it, provided that the committee is able to satisfy them at a later date that a sufficient number of the firms concerned are similarly prepared to sign it.

The various classes of yarns produced by American type spinners are grouped into four sections *A*, *B*, *C*, and *D*, and it is stated that a membership of not less than 90 per cent. of any of the four groups will be necessary before the agreement can operate. This, however, must not be taken as an indication that the agreement will automatically come into force when that percentage is obtained. It will only operate when the members are satisfied that the contributing firms are sufficient in number to ensure its effective working.

It is intended that the agreement shall cover all "American-type" and "Indian-type" cotton yarns up to and including 69's mule weft, 57's mule twist, and 64's ring twist and weft, and also any of the counts, known as allied counts, which may be spun finer than these from the same mixing and/or the same selling range. Cotton waste yarns are not to be included.

By the adoption of the procedure shown in the grouping of yarns, it will be seen that the agreement cannot be operated for the control of American-type mule twist yarns unless all American-type ring yarns are also controlled at the same time, and similarly the agreement cannot operate for the control of American type weft yarns unless all American-type weft yarns (within the limits of the counts range previously stated) are also controlled.

The term "Indian yarn" means all yarns made from an all-Indian cotton mixing or a mixing of Indian cotton and waste, both of which will be considered to come within *A* or *C* groups.

For the purposes of the agreement American-type yarns would be divided into the following eleven sections :—

(1) The low mule section, comprising low quality coarse mule-spun weft and mule-spun twist spun from all Indian cotton.

(2) The coarse mule weft section, comprising mule weft not included in section (1) of all counts up to and including 34's and allied yarns of other counts.

(3) The medium mule weft section, comprising mule weft of counts over 32's up to and including 46's and allied yarns of other counts.

(4) The medium fine mule weft section, comprising mule weft counts over 46's and up to and including 69's and allied yarns of other counts.

(5) The coarse mule twist section, comprising mule twist not included in section (1) of counts up to and including 34's and allied yarns of other counts.

(6) The medium mule twist section, comprising mule twist of counts over 31's and up to and including 40's and allied yarns of other counts.

(7) The medium fine mule twist section, comprising mule twist of counts over 40's and up to and including 57's and allied yarn of other counts.

(8) The low ring section, comprising low quality ring-spun weft and ring-spun twist spun from all Indian cotton.

(9) The coarse ring section, comprising ring weft and twist yarns not included in section (8) of all counts up to and including 34's and allied yarns of other counts.

(10) The medium ring section, comprising ring weft and twist yarns of counts over 32's and up to and including 46's and allied yarns of other counts.

(11) The fine ring section, comprising ring weft and twist yarns of counts over 46's and up to and including 64's and allied yarns of other counts.

Members in the same class of trade are to be grouped together, divided into sections correspondingly with their productions, and automatically connected with every section covering their class of trade. Immediately after the execution of the agreement each member is to supply to the secretary reference samples of every quality of American-type yarn spun or controlled by him together with written particulars in a form showing the highest and lowest counts in which such quality is spun and its quality mark, and the average number of spindles operated or controlled by him spinning or capable of spinning such qualities, and the names of the mills operated and controlled by him where such spindles are installed.

In special circumstances, special powers would be conferred upon the Executive Council, and with regard to price concessions, it is stated—

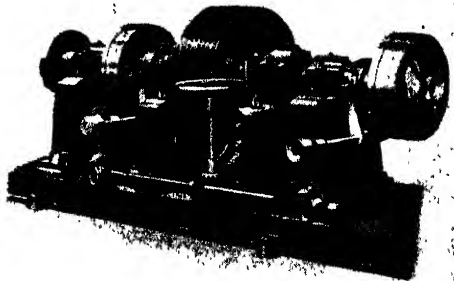
" If in their opinion the business of the members in export markets is being adversely affected by the operation of the minimum prices laid down or by unfair prices of foreign competitors they may allow the members concerned to make specified or general reductions from the minimum prices in force in such manner that there shall be no discrimination whatsoever between one member concerned and another. The Executive Council shall lay down the methods under which any such reductions may be operated (whether by price reduction or rebates or by any other appropriate method), and they shall take such steps,

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such as securing proof that goods have actually been exported, as will satisfy them that a proper supervision is exercised over all such transactions and that evasion will be prevented.

"They may draw up and impose a uniform sales contract or series of contracts suitable for the various requirements of the yarn concerned or of the particular market therefor in such a manner that no variation or discrimination shall be made as between one member concerned and another in the same class of trade. Any such contract may (1) include a provision as to minimum prices for resale of the yarn ; (2) be in a separate form incorporated by reference into any particular contract ; (3) contain uniform clauses and conditions ; (4) lay down and provide for definite completion dates ; (5) prohibit division of commission or excessive discounts ; (6) contain provisions for a stop list should the customer not comply with such contract or otherwise act contrary to the interest or welfare of the members or any of them."

The executive committees of the existing agreements desire the comprehensive agreement to be put into force to cover the period which must elapse before the Cotton Industry (Reorganisation) Bill now before Parliament becomes operative.

The "particulars form" which the firms are asked to fill up is to be returned to the secretary not later than April 29.

NIGHT WORK IN JAPAN

According to a report taken from the *Indian Textile Journal*, Japanese textile industrialists are reported to be supporting a movement to revive night work by female operatives in the textile industry, particularly the cotton spinning and rayon production branches. Night work by female operatives in the textile industry in general has hitherto been prohibited by international agreement.

SOVIET TEXTILE INDUSTRY UNDER THIRD FIVE-YEAR PLAN

One of the most essential light industries in the Soviet Union is the textile industry, particularly the branch manufacturing cotton fabrics. In 1939 the Soviet cotton textile industry of all-Union importance is expected to produce 3,602,400,000 metres of cotton fabrics (this figure not including the output of the cotton mills of local importance or of the producers' co-operatives).

An interesting feature of the development of the cotton textile industry is the creation of a home supply of raw cotton. In 1913 nearly 200,000 tons of cotton were imported into Russia for the production of 2,100 million metres of cotton cloth. Even in 1927-28, the Soviet Union expended nearly 150 million gold roubles on the importation of cotton. The cotton textile industry was dependent on foreign countries not only for its raw materials, but also for its machinery, spare parts, dyes, etc. In recent years the position was radically changed. Textile machinery is now being produced at home and home-grown cotton has long been sufficient to meet the requirements of the cotton textile industry. In

1930 the Soviet textile industry was supplied with 327,400 tons of home-grown cotton ; in 1933 (the first year of the Second Five-year Plan) with 409,500 tons ; and in 1938 (the first year of the Third Five-year Plan) the Soviet textile industry was supplied with 885,000 tons of home-grown cotton, mainly of long fibre varieties.

The Third Five-year Plan makes still greater provisions for the development of the textile industry. In the last year of the Third Five-year Plan, 1942, the cotton textile industry is expected to turn out 4,900 million metres of cotton fabrics, representing an increase of 42 per cent. over the output of 1937, the last year of the Second Five-year Plan. The output of woollen fabrics in 1942 as compared with 1937 will be increased by 67 per cent., while similar increases in production are indicated in the Five-year Plan for other branches of the textile industry of the U.S.S.R.

(Cotton, Manchester)

SPAIN

MILLS DESTROYED IN CATALONIA

According to various press reports, the damage sustained by the textile factories in Catalonia is greater than was at first supposed. About 20 per cent. of the mills are estimated to have been destroyed, whilst in many mills which have remained intact the textile machines were replaced by machinery for the manufacture of war material. Before these latter mills can be restarted they will require new machines, as the old ones have either been scrapped or otherwise become useless. The Catalonian textile industry is said to have been supplied during the course of the civil war with raw cotton chiefly from Russia, 15,000 bales being discovered in Barcelona after the entry of the Nationalist troops. A further 55,000 bales of cotton and 14,000 tons of coal recently arrived in Barcelona, so that the undamaged mills will be able to start up again.

INCREASED DUTY ON INDIAN RAW COTTON IMPORTS

According to the *Indian Textile Journal*, widespread dissatisfaction has been created throughout the length and breadth of the country by the budget proposal of Sir James Grigg, Finance Member of the Government of India, to double the duty on imported raw cotton by raising it from half an anna to one anna per lb.

IRAN

A cotton spinning mill equipped with 5,328 spindles began operations in the latter part of 1938. The mill (located at Qum) was financed by several Teheran merchants. The machinery was purchased in Germany

at a total cost of 2,639,000 rials. (The rial is pegged to the pound sterling at the rate of about 80 rials to the pound.) Official statements indicate that domestic production of cotton yarn and fabrics has been increasing.
(*U.S. Department of Commerce*)

ANGOLA (PORTUGUESE WEST AFRICA)

Authorisation for the establishment of a blanket mill is reported to have been granted to the Algodoeira, Lda., a firm composed of textile concerns having plants in Portugal. The mill will use low grade and short staple cotton for the production of a very low-priced blanket for sale to the natives. This mill represents the first attempt to manufacture cotton in Angola which at present imports its cotton cloth requirements largely from continental Portugal and to a lesser extent from foreign countries.
(*U.S. Department of Commerce*)

THE ITALIAN COTTON INDUSTRY AND SYNTHETIC FIBRES

In conformity with a recent decree, cotton manufacturers are to consume 60,000 metric tons of synthetic fibres during 1939 in the production of cotton goods for the domestic market. The decree is reported to make it unlawful, after January 1, 1939, for cotton manufacturers to sell, for Italian consumption, yarns or fabrics which do not contain an admixture of fibres produced in Italy. Uncertainty as to the effect of this decree somewhat obscures prospects in the domestic market, while the outlook in the export trade in cotton manufactures seems to be less promising, owing to keen competition in some markets.

(*U.S. Department of Commerce*)

CHINA

Two Chinese cotton mills with a total of 10,000 spindles have begun operations in Chungking recently, according to press reports, with machinery moved from Hangkow last summer.

(*U.S. Department of Commerce*)

COTTON TRADE STATISTICS

U.S.A.

Exports of Raw Cotton and Cotton Manufactured Goods from U.S.A.
for Year ending December, 1938.

				Twelve months ending December, 1938	
				Quantity	Dollars
COTTON, UNMANUFACTURED	..	{ bales .. 1,000 lb.	4,561,662 2,442,231	}	228,669,387
Raw Cotton, except linters	..	{ bales .. 1,000 lb.	4,316,420 2,288,645	}	224,314,980
American Egyptian	.. ..	{ bales .. 1,000 lb.	140 69	}	15,922
Other 1½ ins. and over	.. ..	{ bales .. 1,000 lb.	52,052 27,333	}	2,817,086
Upland, under 1½ ins.	.. ..	{ bales .. 1,000 lb.	4,264,228 2,261,243	}	221,481,972
<hr/>					
Linters :					
Grades 1 to 8 inclusive	..	{ bales .. 1,000 lb.	245,242 153,586	}	4,354,407
<hr/>					
COTTON SEMI-MANUFACTURES	..	lb.	145,526,464		11,675,369
Cotton pulp	.. ..	lb.	44,059,932		2,939,702
Cotton rags, except paper stock	.. ..	lb.	12,554,486		672,058
Cotton batting, carded cotton, and roving	.. ..	lb.	367,655		58,658
Cotton card strips and comber waste	.. ..	lb.	23,323,061		1,877,790
Other soft wastes	.. ..	lb.	46,880,989		2,592,544
Cotton hard wastes of yarns and threads, including wiping	.. ..	lb.	8,414,068		446,991
Cotton yarn :					
Carded yarn, not combed	.. ..	lb.	6,990,023		1,718,503
Combed yarn :					
Mercerised	.. ..	lb.	1,495,306		915,369
Not mercerised	.. ..	lb.	1,440,944		453,754
<hr/>					
COTTON MANUFACTURES	.. ..	..	—		45,311,483
<hr/>					
Cotton thread and cordage :					
Sewing thread	.. ..	lb.	1,004,557		835,523
Crochet, darning, and embroidery cotton	.. ..	lb.	35,440		27,505
Twine and cordage	.. ..	lb.	2,829,855		839,035
<hr/>					
Cloth, duck and tyre fabric	.. ..	sq. yd.	319,633,920		30,561,276
<hr/>					
All cotton cloth when exported to the Philip- pine Islands to be embroidered and other- wise manufactured and returned to the United States	.. ..	sq. yd.	14,044,352		1,271,689

U.S.A. EXPORTS OF RAW COTTON, &c.—*continued*

					Twelve months ending December, 1938	
Tyre fabric :					Quantity	Dollars
Cord	..	..	..	sq. yd.	2,589,193	707,688
Other	..	..	..	sq. yd.	1,511,452	372,363
Cotton duck	..	..	..	sq. yd.	8,904,492	1,897,660
Heavy filter, paper dryer, hose and belting duck	..	..	..	sq. yd.	491,918	172,142
Unbleached :						
Ounce	..	..	..	sq. yd.	4,273,903	631,620
Numbered	..	..	..	sq. yd.	2,520,228	678,113
Bleached	..	..	..	sq. yd.	507,059	117,155
Coloured	..	..	..	sq. yd.	1,111,386	298,621
Cotton cloth, unbleached	..	..	..	sq. yd.	76,312,206	4,163,085
Drills, twills and sateens	..	..	..	sq. yd.	5,202,568	428,348
Sheetings, 40 ins. wide and under	..	..	..	sq. yd.	50,679,486	2,609,609
Sheetings, over 40 ins. wide	..	..	..	sq. yd.	1,507,443	103,664
Osnaburgs	..	..	..	sq. yd.	10,921,327	666,121
All other unbleached	..	..	..	sq. yd.	8,001,382	355,343
Cotton cloth, bleached	..	..	..	sq. yd.	42,875,410	3,975,993
Drills, twills and sateens	..	..	..	sq. yd.	4,787,325	711,082
Sheetings, 40 ins. wide and under	..	..	..	sq. yd.	7,672,223	598,810
Sheetings, over 40 ins. wide	..	..	..	sq. yd.	5,559,453	540,032
All other bleached	..	..	..	sq. yd.	24,876,409	2,126,069
Cotton cloth, coloured	..	..	..	sq. yd.	173,396,815	18,172,798
Voiles	..	..	..	sq. yd.	5,844,759	556,105
Percalés and prints, 32 ins. and narrower	..	..	..	sq. yd.	909,597	89,579
Percalés and prints, over 32 ins. wide	..	..	..	sq. yd.	25,879,182	2,528,331
Flannels and flannelettes	..	..	..	sq. yd.	2,545,834	225,798
Khaki and fustians	..	..	..	sq. yd.	5,360,844	962,695
Denims	..	..	..	sq. yd.	12,614,669	1,481,478
Suitings ("drills," etc.)	..	..	..	sq. yd.	15,334,708	1,961,661
Chambrays	..	..	..	sq. yd.	16,123,115	1,183,255
Other printed fabrics, 7½ and more yds. per lb.	..	..	..	sq. yd.	9,081,026	966,520
Other printed fabrics, less than 7½ yds. per lb.	..	..	..	sq. yd.	31,631,407	3,351,357
Other piece-dyed fabrics, 5 and more yds. per lb.	..	..	..	sq. yd.	25,736,026	2,231,910
Other piece-dyed fabrics, less than 5 yds. per lb.	..	..	..	sq. yd.	15,680,099	1,754,122
All other yarn-dyed fabrics	..	..	..	sq. yd.	5,621,608	691,738
Cotton and rayon mixtures (chief value cotton)	..	..	..	sq. yd.	1,033,941	188,240
Other cotton fabrics :						
Blankets	..	..	..	lb.	969,756	456,267
Damasks	..	..	..	sq. yd.	143,157	43,393
Tapestries and other upholstery goods	..	..	..	sq. yd.	528,849	198,354
Plushes	..	..	..	sq. yd.	161,408	100,432
Other pile fabrics	..	..	..	sq. yd.	110,337	64,043
Fabrics sold by the lb.	..	..	..	lb.	9,209,326	2,103,874
Cotton wearing apparel	..	..	..	..	—	5,847,678
Gloves	..	..	..	doz. pr.	45,598	90,989

U.S.A. EXPORTS OF RAW COTTON, &c.—*continued*

					Twelve months ending December, 1938	
					Quantity	Dollars
Knit goods :						
Hosiery	..	..	..	doz. pr.	371,035	567,247
Women's	..	..	..	doz. pr.	55,991	88,023
Children's	..	..	..	doz. pr.	106,771	123,716
Men's socks	..	..	..	doz. pr.	208,273	355,508
Underwear :						
Men's and boys'	..	..	..	doz.	144,594	381,379
Women's and children's	..	..	..	doz.	55,860	131,050
Sweaters, shawls and other knit outerwear	..	..	..	no.	318,849	166,383
Other wearing apparel :						
Cotton overalls, breeches and pants	..	..	..	doz.	38,171	327,502
Underwear, not knit	..	..	..	doz.	66,996	203,382
Shirts	..	..	..	doz.	178,062	1,702,633
Dresses, skirts and blouses	..	..	..	no.	1,707,957	1,403,320
Other cotton clothing	..	..	..	..	—	873,793
Other cotton manufactures :						
Handkerchiefs	..	..	..	doz.	226,303	162,012
Laces, embroideries, and lace window curtains	..	..	..	..	—	174,111
Woven belting for machinery	..	..	..	lb.	211,910	114,897
Terry woven towels, wash cloths, and bath mats	..	..	..	doz.	166,615	385,017
Huck or crash towles	..	..	..	doz.	41,699	50,187
Narrow trimmings (except lace) braids, bindings, lacings and tape labels	..	..	..	..	—	242,870
Cotton bags	..	..	..	lb.	5,459,517	1,397,857
Quilts, comforts, counterpanes and bedspreads	..	..	..	no.	161,793	264,561
Bed sheets, pillow, bolster and mattress cases	..	..	..	doz.	29,517	146,947
Other cotton manufactures, n.e.s.	..	..	..	..	—	1,295,644

The above figures are exclusive of the following shipments to Hawaii, Puerto Rico and the Virgin Islands :—

Total cotton goods exports to :

- (1) Hawaii, \$6,702,275.
- (2) Puerto Rico, \$14,513,922.
- (3) Virgin Islands, \$117,142.

Imports of Raw Cotton and Cotton Manufactured Goods into U.S.A. for Year ending December, 1938.

					Twelve months ending December, 1938	
					Quantity	Dollars
COTTON, UNMANUFACTURED					106,381,916	9,614,961
Staple under 1½ in., free	..	..	..	lb.	72,285,649	5,883,473
Staple 1½ to 1¾ ins., dut.	..	..	..	lb.	6,693,064	1,198,930
Staple 1¾ ins., or over, dut.	..	..	..	lb.	13,117,848	2,204,611
Cotton linters, free	..	..	..	lb.	14,285,355	327,947
COTTON SEMI-MANUFACTURES					—	1,369,585
Cotton waste, free	..	..	..	lb.	11,383,650	574,946
Yarns and warps :						
Not bleached, dyed, etc., dut.	..	..	..	lb.	13,200	1,858
Bleached, dyed, combed or plied, dut.	..	..	..	lb.	1,041,214	792,781

COTTON TRADE STATISTICS

U.S.A. IMPORTS OF RAW COTTON, &c.—*continued*

					Twelve months ending December, 1938	
					Quantity	Dollars
COTTON MANUFACTURES					—	33,278,531
Sewing thread, crochet, darning and embroidery cotton, dut.					1,000 yd.	
					863,932	396,427
Cotton cloth :						
Not bleached, etc., dut.					sq. yd.	2,818,631
Bleached, dut.					sq. yd.	35,035,049
Printed, coloured, etc., dut.					sq. yd.	20,427,859
Cotton fabrics, n.e.s. :						
Cloth less than 17 per cent. wool, dut.					lb.	679
Tapestries and upholstery, dut.						1,010,440
Velvets and velveteens, dut.					sq. yd.	1,033,913
Other pile fabrics, dut.						144,479
Table damask, dut.					lb.	1,478,695
Table covers, napkins, etc., dut.						419,175
Blankets and blanket cloth, dut.					lb.	30,351
Bedspreads and quilts, dut.					no.	2,287,738
Sheets, cases, towels, etc., dut.						293,181
Wearing apparel :						
Knit or crocheted goods :						
Gloves and mittens, dut.					doz. pr.	1,286,368
Hosiery, dut.					doz. pr.	713,060
Underwear and other, dut.						—
Wearing apparel, not knit, dut.						—
Apparel wholly or partly of lace, or embroidered, etc., dut.						—
From Philippine Islands, free						5,651,318
Handkerchiefs :						
Not embroidered, nor of lace, dut.					doz.	1,867,075
Embroidered, etc., dut.					no.	1,157,977
Laces, embroideries, etc. :						
Hand-made laces, lace fabrics and lace articles over 2 ins. wide, valued over \$50 per lb. dut.					lb.	71
						8,347
Hand-made laces, n.e.s., dut.						—
						141,091
Machine-made laces, dut.						—
						2,215,881
Lace articles, etc., dut.						—
						301,417
Lace window curtains, dut.						—
						308,476
Embroideries, dut.						—
						22,430
Other articles, trimming, etc., dut.						—
						1,176,812
From Philippine Islands, free						—
						367,238
Cotton floor coverings, dut.					sq. yd.	9,021,764
Belts and rope used as belting, dut.					lb.	157,707
Rags, except paper stock, dut.					lb.	18,535,147
All other, dut.						—
						2,544,019

The above figures are exclusive of total cotton goods imports from Puerto Rico amounting to \$9,377,939.

WORLD PRODUCTION AND CONSUMPTION OF RAYON IN 1938

(Statistics reproduced from the *Silk Journal and Rayon World*, February, 1939.)

PRELIMINARY FIGURES

WORLD PRODUCTION OF CONTINUOUS FILAMENT RAYON

				Million lb.			
				1938	1937	1936	1935
Japan				209.60	336.60	277.20	239.80
Germany				143.00	165.00	121.00	102.50
Italy				102.25	106.55	87.10	85.25

WORLD PRODUCTION OF CONTINUOUS FILAMENT RAYON

—continued

				Million lb.			
				1938	1937	1936	1935
United States	..	..	..	242.50	312.80	275.40	255.00
Great Britain	..	..	..	107.40	120.70	115.60	110.75
France	..	..	..	72.95	66.20	46.50	51.15
Holland	..	..	..	21.65	21.60	20.80	20.30
Belgium	..	..	..	16.20	17.50	14.10	13.75
Poland	..	..	..	13.80	13.45	10.75	10.60
Canada	..	..	..	17.30	16.00	13.50	13.40
Switzerland	..	..	..	11.25	11.80	9.00	10.20
Russia	..	..	..	13.90	12.25	12.25	12.00
Others	..	..	..	23.50	21.30	21.85	20.50
World Output	..	..	..	995.30	1,221.75	1,025.05	945.20
Europe	..	..	..	519.25	551.35	458.95	437.00
Overseas Countries	..	..	..	476.05	670.40	566.10	508.20
Including Brazil and Argentina	..	..	..	6.65	5.00		

WORLD CONSUMPTION OF CONTINUOUS FILAMENT RAYON

				Million lb.			
				1938	1937	1936	1935
Japan	..	..	..	190.50	252.50	224.00	172.50
Germany	..	..	..	140.30	145.90	115.80	103.40
Italy	..	..	..	50.25	48.75	46.30	39.60
United States	..	..	..	235.60	265.30	260.20	207.75
Great Britain	..	..	..	89.50	109.05	104.60	98.80
France	..	..	..	62.80	53.80	37.45	39.70
Holland	..	..	..	8.80	6.40	7.50	6.90
Belgium	..	..	..	12.75	12.50	9.30	7.20
Poland	..	..	..	13.30	12.20	11.10	10.40
Canada	..	..	..	17.10	16.60	14.85	14.50
Switzerland	..	..	..	6.50	6.25	5.90	7.70
All Others	..	..	..	122.50	135.50	137.95	116.90
World Consumption	..	..	..	949.90	1,064.75	974.95	825.35
Europe*	..	..	..	404.85	416.85	366.20	337.35
Countries with small or without production	..	..	..	101.85	113.50	109.70	93.25
*Including countries not named	..	..	..	20.65	22.00	28.25	23.65

WORLD PRODUCTION OF STAPLE FIBRE, RAYON AND WASTE

				Million lb.			
				1938	1937	1936	1935
Japan	..	..	..	355.00	172.95	45.30	13.40
Germany	..	..	..	360.00	225.00	99.00	34.30
Italy	..	..	..	180.75	157.45	108.90	65.30
United States	..	..	..	31.80	20.20	12.10	6.05
Great Britain	..	..	..	33.80	35.10	27.00	9.90
France	..	..	..	16.10	15.30	11.70	7.90
Holland	..	..	..	2.75	2.35	0.95	—
Belgium	..	..	..	6.80	5.20	—	—
Poland	..	..	..	7.60	3.20	1.40	0.75
Canada	..	..	..	—	—	—	—
Switzerland	..	..	..	2.75	2.10	—	—
Russia	..	..	..	—	—	—	—
All Others	..	..	..	1.60	1.00	0.40	—
World Output	..	..	..	998.95	639.85	306.75	137.60
Europe	..	..	..	612.15	446.70	249.35	118.15
Overseas Countries	..	..	..	386.80	193.15	57.40	19.45

WORLD CONSUMPTION OF STAPLE FIBRE, RAYON AND WASTE

	Million lb.			
	1938	1937	1936	1935
Japan	320.90	133.50	34.50	12.80
Germany	365.60	209.50	91.50	42.50
Italy	141.50	117.50	72.20	40.70
United States	60.75	47.70	33.90	16.40
Great Britain	19.25	25.80	20.55	7.75
France	14.80	12.35	6.20	5.50
Holland	2.60	2.10	1.55	0.60
Belgium	4.00	3.20	—	—
Poland	4.70	4.25	1.90	1.05
Switzerland	3.20	2.60	—	—
All Others	32.00	24.50	23.25	3.20
World Consumption	969.30	582.50	285.55	130.50
Europe*	559.25	379.20	208.15	101.30
Countries with small or without production	28.40	22.10	9.00	—
*Including countries not named	3.60	2.40	4.25	3.20

JAPAN

QUANTITIES AND VALUE OF COTTON PIECEGOODS EXPORTED FROM JAPAN IN 1938.

Country of Destination	Sq. yds.	Value in Yen	Comparison in value with 1937
Korea	60,992,583	17,542,815	— 12,519,705
Dairen	71,209,648	19,605,247	— 5,547,053
Yeiko	2,150,229	587,808	+ 252,716
Others	191,722	126,910	+ 84,506
Kwantung Province	57,743,475	17,239,507	— 11,751,674
Northern	63,579,567	13,260,892	+ 11,940,762
Middle	46,976,667	10,626,896	+ 795,160
Southern	—	—	— 125,933
Hongkong	23,136,733	4,594,372	— 4,915,765
French Indo-China	149,350	19,099	— 1,095
Siam	80,086,642	14,892,811	— 1,255,989
British Malay	680,636	152,900	— 207,105
The Straits Settlement	26,293,894	5,053,247	— 7,169,013
Burma	27,697,381	5,486,088	+ 5,486,088
British India	469,511,829	67,896,995	+ 4,847,038
Ceylon	19,121,925	3,621,046	+ 987,259
Iran	16,840,761	4,166,488	+ 1,879,520
Iraq	53,582,203	9,788,013	— 1,058,740
Syria	55,675,920	9,867,062	— 702,781
Palestine	9,524,465	1,823,390	— 820,478
Arabia	24,243,384	3,862,505	+ 573,865
Bahrein Island	9,605,850	1,480,651	+ 92,466
Aden	41,309,881	6,293,389	— 3,586,556
Cyprus	188,936	22,559	+ 18,832
Philippine Islands	32,678,482	6,053,305	— 6,003,545
British Borneo	65,615	18,730	— 42,862
Dutch India	246,252,896	39,460,264	— 46,142,483
Others	7,661,553	1,104,187	+ 173,758

COTTON TRADE STATISTICS

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JAPANESE PIECEGOODS EXPORTS—continued

Country of Destination	Sq. yds.	Value in Yen	Comparison in value with 1937
Great Britain	16,595,463	2,679,448	— 2,129,433
Irish Free State	3,339,186	575,555	— 19
France	2,682,736	542,186	— 392,468
Germany	19,929,747	3,100,302	— 948,123
Italy	195,250	41,862	— 353,438
Switzerland	2,953,858	591,197	— 534,024
Austria	879,026	195,480	— 268,470
Czecho-Slovakia	1,048,024	183,256	— 1,395,687
Belgium and Luxemburg	4,592,818	916,958	— 1,351,207
Holland	172,505	19,747	+ 201,112
Denmark	314,015	62,906	+ 3,732
Finland	7,192,779	1,812,820	— 1,156,678
Latvia	—	—	— 5,188
Sweden	14,778,094	2,716,102	— 568,531
Norway	5,828,610	1,149,894	— 427,591
Portugal	260,352	60,037	— 13,496
Spain	46,633	6,057	— 4,793
Gibraltar	1,900,654	481,392	— 276,029
Greece	—	—	— 91,953
Turkey	12,715,608	2,080,886	— 407,991
Malta	100,631	11,669	— 2,586
Others	34,302	5,718	— 98,754
U.S.A.	16,115,407	2,406,587	— 19,791,357
Canada	889,450	291,609	— 265,571
Others	392	218	+ 80
Mexico	364,204	114,595	— 255,607
Guatemala	170,558	36,516	— 1,494
Honduras	7,436,486	1,344,112	— 871,909
Salvador	46,039	10,583	— 4,913
Nicaragua	584,315	128,950	— 294,912
Costa Rica	7,164,294	1,377,503	— 516,053
Panama	6,593,116	1,313,739	+ 67,333
Panama Canal Zone	107,498	19,734	— 55,848
Cuba	54,379	27,570	— 39,425
Jamaica	16,489	4,427	+ 325
Haiti	2,495,312	377,303	— 1,571,855
Dominican Rep.	9,574,233	1,864,891	— 2,184,591
Bahamas	1,323	846	— 5,247
Porto Rico	520,960	101,805	— 1,827,071
St. Vincent	—	—	— 1,200
Trinidad and Tobago	192,125	37,434	+ 24,707
Curacao	2,336,392	437,107	+ 42,977
Others	65,989	16,405	— 129,694
Peru	5,512,006	1,338,214	— 16,838
Chile	22,087,727	4,390,798	— 3,548,890
Argentine	66,562,531	13,143,978	— 16,154,904
Uruguay	10,065,736	2,007,082	— 2,925,371
Paraguay	6,804,410	1,327,515	— 2,324,479
Brazil	334,043	87,196	— 193,302
French Guiana	1,167	491	— 2,085
Dutch Guiana	3,151,874	622,251	+ 232,521
British Guiana	62,041	8,605	+ 3,676
Venezuela	12,181,325	2,698,287	— 2,690,840
Colombia	72,350	18,650	— 62,380
Ecuador	2,411,144	518,168	— 1,383,337
Bolivia	9,397,652	2,302,636	+ 2,302,636
Others	22,923	8,576	— 1,641,750
Egypt	21,335,968	3,340,641	— 7,155,204
Anglo-Egyptian Sudan	77,689,407	10,073,779	— 1,998,474
Entrea	6,757,277	1,221,971	+ 1,211,673
French Somali Coast	1,694,531	217,273	— 252,585

JAPANESE PIECEGOODS EXPORTS—*continued*

Country of Destination	Sq. yds.	Value in Yen	Comparison in value with 1937
Italian Somaliland	—	—	— 42,639
Kenya, Uganda and Tanganyika	85,129,243	15,888,915	— 7,007,849
Mozambique	11,053,690	2,784,731	— 1,198,627
Rhodesia	32,500	11,272	+ 5,634
Union of South Africa	26,177,049	7,119,263	— 3,087,076
Angola	4,470,910	914,716	— 937,336
Belgian Congo	19,414,124	4,493,283	— 5,810,550
Cameroons	4,443,249	864,545	— 1,318,029
Nigeria	4,935,295	1,062,676	— 1,007,334
Dahomey	1,256,444	255,913	— 299,727
Gold Coast	1,511,290	309,648	— 189,479
Liberia	655,136	155,667	— 38,775
Sierra Leone	6,000	505	— 2,960
French Guinea	954,421	230,585	— 259,841
Senegal	192,224	109,051	— 17,412
French Morocco	86,466,201	13,787,513	+ 2,965,720
Spanish Morocco	1,399,338	209,016	+ 158,271
Algeria	2,240,119	381,800	— 370,115
Tunis	—	—	— 1,905
Libya	368,105	63,325	+ 63,325
Canary Islands	254,541	52,831	+ 29,812
Madagascar and Reunion ..	35,548	14,056	— 1,769
Mauritius	870,465	215,627	+ 21,253
Ethiopia	45,012	7,662	+ 7,662
French Equatorial Africa ..	4,649,611	1,004,452	+ 1,004,452
Others	2,418,402	502,245	— 1,685,447
Australia	64,310,728	15,047,002	+ 1,512,866
New Guinea	1,371,439	321,894	— 219,067
New Caledonia	414,131	89,040	— 4,729
New Zealand	9,527,171	2,483,394	— 548,572
Gilbert Is. and Ellice Is. ..	213,823	53,414	— 283,741
Fiji	41,330	9,199	— 13,700
Society Islands	18,333	3,456	— 55,339
Hawaii	1,351,326	399,664	— 179,727
Others	159,490	39,446	— 21,668
Grand Total	2,179,972,279	404,004,499	— 168,449,496

	Grey	Bleached	Dyed, Printed and Yarn Dyed	Total
Total for 1938 ..	829,225,730	509,783,883	840,962,666	2,179,972,279
Value in yen ..	126,318,324	88,773,714	188,912,461	404,004,499
Total since Jan., 1937	809,854,361	646,182,229	1,183,645,636	2,639,682,226
Value in yen ..	148,433,416	124,276,778	299,743,801	572,453,995

EXPORTS OF INDIAN COTTON

According to the statistics published by the Bombay Chamber of Commerce, the total all-India exports of Indian raw cotton throughout the calendar year 1938 were as under:—

To	1938	1937	Gain or loss
	(in '000's of bales)		
U.K.	393	469	— 76
Continent	753	1,108	—355
U.S.A.	53	94	— 41
China	180	102	+ 78
Japan	1,311	1,903	—592
Others	22	19	+ 3
TOTAL	2,712	3,695	—983

PORTUGUESE COTTON—IMPORT AND EXPORT STATISTICS, 1938

(Figures supplied by Arantes Pereira, of Oporto)

		IMPORTS.			
		RAW COTTON.			
				Kgs.	
Portuguese Empire :	Angola .. .. .	..	..	3,040,533	
	Mozambique .. .. .	..	..	7,330,296	
					10,370,829 Kgs.
Brazil .. .. .	..	..	..	6,050,811	"
China .. .. .	..	..	..	16,365	"
Egypt .. .. .	..	..	..	1,824,868	"
U.S.A. .. .. .	..	..	..	8,446,468	"
British West Africa .. .. .	..	..	..	133,563	"
British East Africa .. .. .	..	..	..	255,863	"
British India .. .. .	..	..	..	685,534	"
Peru .. .. .	..	..	..	40,909	"
Other Countries .. .. .	..	..	..	28,067	"
					27,853,277 "
		GREY YARNS.			
Germany .. .. .	..	..	..	29,060	Kgs.
Belgium—Luxemburg .. .. .	..	..	..	107,829	"
U.S.A. .. .. .	..	..	..	1,430	"
France .. .. .	..	..	..	165,028	"
United Kingdom .. .. .	..	..	..	2,478	"
Italy .. .. .	..	..	..	215,636	"
Japan .. .. .	..	..	..	2,024	"
Holland .. .. .	..	..	..	103,098	"
Sweden .. .. .	..	..	..	5,769	"
Switzerland .. .. .	..	..	..	230,990	"
Other Countries .. .. .	..	..	..	195	"
					863,537 "
		DOUBLED YARNS.			
Germany .. .. .	..	..	..	6,968	Kgs.
Belgium—Luxemburg .. .. .	..	..	..	1,472	"
France .. .. .	..	..	..	17,443	"
United Kingdom .. .. .	..	..	..	59,996	"
Italy .. .. .	..	..	..	1,642	"
Japan .. .. .	..	..	..	35,283	"
Holland .. .. .	..	..	..	4,898	"
Switzerland .. .. .	..	..	..	2,694	"
Other Countries .. .. .	..	..	..	832	"
					131,228 "
		EXPORTS.			
		COTTON PIECEGOODS.			
				Kgs.	
Portuguese Empire :	Cabo Verde .. .. .	..	..	88,377	
	Guiné .. .. .	..	..	64,066	
	S. Tomé and Príncipe .. .. .	..	..	21,575	
	Angola .. .. .	..	..	1,162,559	
	Mozambique .. .. .	..	..	908,374	
	Macau .. .. .	..	..	314	
					2,245,265 Kgs.
Germany .. .. .	..	..	..	463	"
Spain .. .. .	..	..	..	712,382	"
Morocco (Spanish zone) .. .. .	..	..	..	2,253	"
United Kingdom .. .. .	..	..	..	1,763	"
Other Countries .. .. .	..	..	..	1,764	"
Foreign Steamers .. .. .	..	..	..	10	"
					2,963,900 "

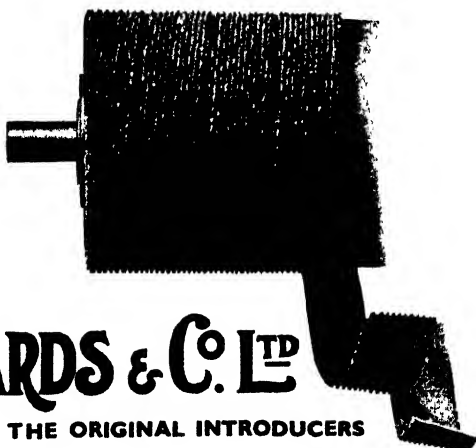
EXPORTS OF COTTON FROM ARGENTINA DURING 1938

Month	Quantity in Kilos
January	98
February	1,059
March	98
April	—
May	824,769
June	1,151,039
July	5,449,359
August	4,755,205
September	4,812,900
October	2,532,694
November	1,956,145
December	877,721
TOTAL	22,361,087

(An Argentine bale weighs 240 kilos)

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MISCELLANEOUS

ENGLISH COTTON INDUSTRY RESEARCH IN 1938

The following is contained in the Report for the year 1937-38 of the Department of Scientific and Industrial Research, published by H.M. Stationery Office, London. Price 3s. net.

During the year, a new machine shop and a new laboratory building providing altogether 16,000 square feet of additional accommodation were completed at the Shirley Institute, the headquarters of the Cotton Research Association. The new machine shop is equipped to enable the Association to construct the first model of any new machine without the delay of going to outside machinery firms for experimental constructional work. The laboratory block is to be used for experimental work leading to the design of new machines and for studying the behaviour of cotton in them when completed. There is also room to house newly-developed machines so that members of the Association may inspect them at will and be able to see them actually working. Work on the opening and cleaning of cotton is also being carried on in the new buildings.

A range of finishing machinery has also recently been installed at the Institute, which is already in constant use testing out on the works scale results obtained from fundamental work in the laboratory.

Changes which have taken place during the last fifteen to twenty years in the finishing end of the industry have proceeded side by side with the development of methods of control worked out at the Shirley Institute, but until now there has been no equipment corresponding to that in the spinning and weaving departments for the investigation of finishing problems. It is hoped that the new machinery will facilitate the investigation of many problems which have so far been shelved since they could not be carried to a complete solution by laboratory methods alone.

A programme of large-scale work has been begun on the problems connected with crepeing. The factors governing the production of the crepe are very imperfectly known and following upon a mathematical analysis of the problem, the production and processing of crepe fabrics under accurately controlled conditions are now being investigated.

Hitherto the Association has lacked the equipment for waste spinning, but during the year machinery for dealing with both types of waste has been installed and attention is being directed to the solution of problems arising in the production of yarns from such material. The comprehensive spinning equipment of the Association now allows for investigations of the processing of textile fibres from the very short (less than half an inch) to the very long (twelve inches).

The report refers to the work of the Liaison Department, which provides the link between the scientific staff of the Institute and technical men in the trade, and becomes with time more and more firmly established. Formed ten years ago, the department consists of statistical and technical assistants whose main duty it is to visit mills and keep the scientific staff *au fait* with processing problems and difficulties which arise while explaining and interpreting the research results which have been communicated to members. Nearly 3,000 such visits were made last year. Another duty is to co-operate with practical men in specific mills in the investigation of special problems which have been put up to the Institute.

NYLON

Reference was made in the last issue of the *International Cotton Bulletin* to the recent invention of a non-cellulose fibre in America termed "Nylon." It has now been announced by Imperial Chemical Industries Ltd. and Courtaulds Ltd. that they have formed a joint company to manufacture this new textile fibre in England, and that the material will eventually be made available to existing silk and other textile industries. Owing to its necessarily higher cost of production it is not expected to compete with existing varieties of rayon but it should find a ready market in, for instance, the fine silk hosiery trade.

The present price has been given as just below the price of silk, or 6s. per lb., with a claim that it could be very substantially reduced. The nature of the raw materials might indicate that theoretically it could be brought down to less than, say, one-third the amounts indicated. So far the material has been produced only in a pilot plant, but very large-scale production may commence in 1940.

PHYSICAL PROPERTIES OF NYLON

A certain amount of caution may be desirable in estimating the possibilities on the basis of physical properties, seeing that there are different materials, and also that an unmentioned defect may prove a considerable barrier in textile use; for example, brittleness in the earlier high-strength viscose rayons, or inability to dye in cellulose acetate. There seems no question of the possibility of great strength, say, 4 to 6 grms. per denier, or several times as strong as ordinary viscose rayon. The elongation at break may be upwards of 50 per cent. In production it is stated that the filaments can be cold-drawn to a final length of over 400 per cent. The claim is that the recoverable extension, that is, elasticity, is between 22 and 26 per cent., the recovery after five repeated stretchings of 20 per cent. being 93 per cent. of the amount. It has been stated that it gives to stretch with less force than silk, that is, lower modulus of elasticity, and that the recovery is slower in time, though better than natural silk over long periods of time (15 hours).

The moisture content is 4.1 per cent. at 70° F. 65 per cent. relative humidity, but after drying to dry weight it recovers only 3 per cent. in the same atmosphere. Strength and elasticity are much less affected by

moisture than are rayons. Unlike all other fibres, Nylon does not swell when wetted out, not even in caustic soda solutions.

The melting point of Nylon is about 260° F., or higher than cellulose acetate and much higher than the German Vinyon, which is a polyvinyl alcohol. A certain amount of care might be necessary in hot ironing as in the case of acetate.

The material can be spun into extremely fine filaments, if desired, down to 0.2 denier. Ordinary filaments resemble natural degummed silk or cuprammonium rayon and are without surface structure. The filaments are more regular even than rayon, being about 6 per cent., against about 8 to 10 per cent. for rayons. Nylon feels rather cold and damp. It is lustrous but can be pigmented for dull effects. The material melts and fuses when burnt in a flame, behaving very like acetate in relation to heat. It can be distinguished from other fibres by the burning test by appearance of globule and the particular smell.

CHEMICAL PROPERTIES

Nylon is resistant to alkalis but is disintegrated by strong acids. It is, however, more resistant to dilute acid treatments than natural silk. It can be dyed with silk or wool dyes, and some direct cotton dyes, without impairing feel or lustre, but the affinity for the different dyes may differ from that of silk or wool.

USES

The major use envisaged for Nylon is the replacement of natural silk in women's stockings. The first actual product, however, appears to be a sewing thread, Neophil, which is not yet commercially available. This is a two or three-ply 195 denier 60 filament yarn in various sizes from 7,000 to 35,000 yds. per lb. It has great strength and regularity and yet elasticity, and the properties suggest that fishing line would be a suitable small field. It is said to have the power of being stretched whilst wet and set and later recovering when wetted out, and use is made of this to form "felts" when mixed in cut form with non-feltable fibres.

CASEIN FIBRES IN LANCASHIRE

According to a recent issue of the *Manchester Guardian*, in the last two or three years the adaptability of cotton spinning machinery for the production of many varying types of yarns, in fibres far removed from cotton, has been clearly illustrated, and staple fibre has played an important part in bringing this about. Lancashire's versatility in the matter of the fibres with which it can deal can be of great value in developing fashion goods at popular prices. The latest development along these lines is the introduction of Courtaulds casein for cotton spinning in conjunction with staple fibre. It is in its early stages at the moment, but already several interesting cloths have been produced, with a wool-like appearance and handle, from yarns containing 67 per cent. staple fibre and 33 per cent. casein. Casein is 14½d. per lb., and staple fibre

rod. per lb., and as there is virtually no waste in these products the mixture yarns are at a reasonable price. The cloths seem to have possibilities for dress materials and sports shirtings, and it is possible that in the heavier counts materials suitable for lightweight suiting and costume cloths of the flannel type will be produced. Progress will be followed with much interest, and it may be that casein fibre, though generally expected to be an assistant to the worsted trade, will prove a valuable new string to Lancashire's bow.

GERMANY AND TEXTILE FIBRES

The production of synthetic textile fibres in Germany made further progress last year. Production of staple fibre (Zellwolle) rose from 46,300 metric tons in 1936 to 102,000 tons in 1937 and to 150,000 tons in 1938; after the completion of new plant an annual capacity of 200,000 tons will be reached this spring. Rayon production rose from 46,100 tons in 1936 to 57,500 tons in 1937 and to 65,000 tons in 1938. Rayon is now increasingly used for industrial purposes (tyres, driving belts, etc.).

(*Manchester Guardian*)

GERMANY : FIBRES FROM COAL

The following is extracted from *Foreign Agriculture*, published monthly by the United States Department of Agriculture.

Experiments recently conducted at the Technische Hochschule in Berlin have demonstrated the possibility of producing cellulose from brown coal, of which Germany has very large reserves. The significance of the development lies in the fact that, if costs of production are not prohibitive, it will furnish another raw material for the production of cellulose from which paper and synthetic fibres can be produced.

Since the initiation of the programme of self-sufficiency, Germany has attempted the production of artificial fibres on a large scale, using mostly wood and straw as raw materials. The utilisation of locally available raw materials for this purpose has served to curtail greatly the importation of cotton, wool, silk, and other natural fibres.

Germany's brown coal reserves represent the result of forces that during geological ages converted vast forests of coniferous trees into deposits of coal. An appreciable percentage of the deposits is said to consist of lignite, from which a good grade of cellulose, especially desirable for paper manufacture, can be produced. The new process is reported as yielding from 15 to 25 per cent. cellulose, compared with about 40 per cent. from wood.

Under the assumption that the brown coal mined in Germany will yield, on an average, about 4 per cent. lignite, it is estimated that some seven million tons of lignite could be made available annually for that purpose. On the basis of a 15 per cent. yield in cellulose, it is estimated

that these seven million tons of lignite would make available more than one million tons of cellulose per annum.

There is as yet, however, no information as to the probable cost of production, though it is pointed out that, compared with wood, lignite is very low in price. Although the production costs of artificial fibres in Germany have been reduced in recent years, they are still high compared with prices of cotton and other natural fibres. Moreover, an additional unfavourable factor has been the fact that the amount of timber cut for cellulose manufacture has exceeded the new growth.

SOUTHERN RESEARCH LABORATORY

Further information about the location and design of the American Southern Regional Research Laboratory, to be established at New Orleans, La., was announced by the U.S. Department of Agriculture recently.

The building, designed as a centre for carrying on chemical, engineering, and related research by a staff of approximately 250 people, will be a U-shaped structure of three stories and above-ground basement. Offices, library and conference rooms will be in the 211-foot base of the U, which will be the front of the building. One of the 306-foot wings will contain research laboratories equipped for work in chemistry, physics or biology. The other will contain a smaller number of laboratories and space for heavy engineering equipment. Service shops and special research rooms will be located in the basement. Both the offices and the laboratories will be air-conditioned. Construction will be fireproof throughout. Steam will be generated in a small separate power plant designed to assure smokeless combustion of gas or oil.

The external walls of the building will be finished in light-coloured brick. The surrounding grounds will be landscaped, and there will be parking space for the automobiles of the staff and of visitors.

The purpose of the Southern Regional Research Laboratory is to find and develop new uses for surplus farm commodities of the region. Cotton, peanuts, and sweet potatoes are to receive first attention. An effort is being made to incorporate into the design and equipment of the building every feature which experience has shown to be useful in furthering research work of this character.

COTTON ASSOCIATION FOR LIMA

It is quite feasible that, as a result of the visit to South America of three members of the Liverpool Cotton Association (see the *I.C.B.*, No. 66, January 1939, page 254), a cotton association will probably be formed in Lima, the capital of Peru.

As previously reported, the three members who travelled to Peru to give advice to the authorities there were Mr. J. Glyn Williams, Mr. Norman Cappel, and Mr. W. J. Walmesley, and when Mr. Glyn Williams arrived at Liverpool recently he stated that a scheme based on the rules

of the Liverpool Cotton Association had been formulated, but it had to be worked out in detail. It was an attempt to organise a cotton market in Lima and to form an association which would regulate the trade for the mutual advantage of all sections and all countries.

The Brazilian Press refers to a recent experiment by cotton exporters to test the merits of a cotton band in place of a steel band on cotton bales. According to a photograph forwarded to us, these new cotton bands appear to be made of very strong webbing, about $1\frac{1}{2}$ ins. wide. The *Revista Textil* states that should the idea of cotton webbing bands prove successful, as experiment which is being continued gives promise, Brazil will save the importation of 27,000 contos.

We have been asked to draw the attention of our readers to the fact that the K.L.M. Royal Dutch Air Lines will again operate their Continental service from Liverpool and Manchester as from the 17th of April, 1939. The 'plane from Liverpool and Manchester to Amsterdam leaves Speke airport at 8 a.m. and Ringway airport at 8-25 a.m. daily, arriving Amsterdam at 11-5 a.m. with the exception of Sundays.

Samples of raw cotton, cotton yarns and cloth posted in the evening or delivered at the Manchester or Liverpool office of the K.L.M. will arrive in most continental countries on the following day.

The address of the Manchester office is Messrs. W. H. Muller & Co. (London) Ltd., 14 Victoria Buildings; Manchester.

Reviews on Current Cotton Literature

"THE BRITISH AND DOMINION TEXTILE INDUSTRY (excluding Lancashire and Yorkshire)." Printed and published by John Worrall Ltd., Oldham.

The forty-ninth (1939) edition of this directory recently made its appearance.

It comprises a most excellent directory and reference book covering the hosiery, lace and kindred trades in the United Kingdom, Eire and the Dominions of Australia, Canada, New Zealand and Tasmania and the Union of South Africa. It also contains details of the spinners, manufacturers, bleachers, dyers and finishers of silk, rayon, cotton, wool, linen, flax, hemp and jute, and all branches of the industry using power.

Price 12/6 post free. Abroad 14/6 net. Pocket Edition 10/6 post free. Abroad 12/6.

"BULLETIN DE L'INSTITUT DE RECHERCHES ECONOMIQUES," Place du Peuple, Louvain.

The February, 1939, issue of this publication contains an interesting survey of the Belgian textile industry during 1938 by Mr. Stanislas Capelle, which contains a useful tabulation relating to the production, consumption, import and export of cotton yarn and piecegoods in Belgium for the years 1929 and 1934-38.

"THE EMPIRE COTTON GROWING REVIEW." Published for the Empire Cotton Growing Corporation by P. S. King & Son Ltd., 14 Gt. South Street, London, S.W.1. Quarterly. Annual subscription 5/-, post free.

The current issue contains many items of interest prominent amongst which are: The Recent Developments in Training for Agricultural Service in the Tropics, and their Reference to Cotton, by Sir Geoffrey Evans; Current Trends in the Use of Cotton, by H. E. Wadsworth; A Cotton Market in Northern Rhodesia, by Kenneth Bradley; Selection and Hybridisation, by C. H. Brown.

"FIBRO IN THE COTTON INDUSTRY."

The above is the title of a recent publication of the firm of Courtaulds Ltd. As well as giving historical information on the development of staple fibre and artificial silk, the book contains valuable information to the cotton spinner upon the use of cut staple in a cotton mill.

The processing details for cotton spinning machinery are contained in a special chapter which gives full details of lap weights, speeds of machinery roller diameters and settings weights of rollers, etc.

Copies of this publication are available from Courtaulds Ltd., Arrow Mill, Rochdale.

"ANUARIO ALGODONERO, 1938," published by the Argentine Ministry of Agriculture. A most extensive statistical survey of cotton production, prices, stocks, consumption, etc., for Argentine cotton. A book of over 240 pages, giving the statistical history of Argentine cotton since 1916 when cotton production in that country was commenced on a commercial scale.

"LAS PLAGAS DEL ALGODONERO EN EL REPUBLICA ARGENTINA" (The insect pests of cotton in the Argentine).

One of the numerous instructive pamphlets issued by the industrious cotton section of the Ministry of Agriculture for the Argentine. This publication is chiefly intended for distribution among Argentine cotton planters with the idea of combating cotton insect pests. It contains excellent colour prints of the major cotton pests and full instructions in regard to their control.

"MODERN BEARING DESIGNS FOR SPINDLES AND OTHER SPINNING AND DOUBLING EQUIPMENT." Published by SKF—Norma, Stuttgart, Germany.

The aim of this most useful booklet which comprises some 100 pages and which is published in English, French and German, is to give spinners important information concerning the properties, mounting and

maintenance of SKF spindles, tension pulleys, and top weighting rollers for drafting mechanisms which are their latest speciality. These last are said to be characterised by frictionless operation, cleanliness, simplicity of handling and maintenance. This information is supplemented by some examples illustrating the use of ball bearings in textile machinery generally. The power consumption of ring spinning frames is dependent on varying degrees on the tape tension, the amount of fly on the machine and the design of the bearings in its spindles and tension pulleys. The SKF Company claim that they lower power consumption by 15 to 30 per cent.

What can be regarded as an interesting development in the spinning frame is the introduction of the SKF ball bearing top weighting rollers which require lubricating only once every 5,000 to 10,000 working hours, as compared with 50 times in the case of ordinary plain bearing top weighting rollers over the same period. The loose bosses of the new rollers are made of hardened steel and the saddle load on the rollers can be increased to 33 lbs., if necessary, without imposing undue strain on the bearings. The loose bosses, which are easily removed and replaced on the arbors, take up their correct position on the bottom roller when the machine is started.

Articles on tension pulleys for tape drives and on anti-friction bearings for textile machinery are included. In the appendix are given tables for the conversion of yarn counts; the spindles installed in different countries and other useful information. The book is well indexed and includes a list of the head offices of SKF companies.

The SKF Company will be glad to supply further particulars on application being made to them. Their licensees in England are Howard & Bullough Ltd., Accrington, Platt Bros. & Co. Ltd., Oldham, and Tweedales & Smalley Ltd., Manchester.

"THE GENETICS OF COTTON," by Dr. Sydney Cross Harland. Published by Jonathan Cape Ltd., 30 Bedford Square, London. Price 10s. 6d. net.

In 1932, Dr. Harland, who is one of the foremost plant geneticists in the world, published an article on the genetics of *Gossypium* which is today a standard work. Owing to the activities of the British Empire Cotton Growing Corporation's research station in Trinidad, of which Dr. Harland was the chief geneticist, since that date remarkable advances in knowledge of the genetics of this important economic plant have been made. The present work presents in summarised form a working account of the development of genetics and the cytology of cotton to the end of 1936.

In addition to the main body of the work dealing with the Taxonomy, Cytology and Genetics, there are appendices on Correlations, Linkage relations, Mutations, Interspecific Hybridisation, Polyploidy and Haploidy, the Comparative Genetics and the Evolving History of the genus *Gossypium*.

This work will be of particular interest to botanists and breeders of cotton.

BOOKS RECEIVED

"TECHNOLOGICAL REPORTS ON TRADE VARIETIES OF INDIAN COTTONS, 1938" (Series A, No. 46). Published by the Indian Central Cotton Committee at the price of Re. 1-8. This publication covers graders' and spinners' test reports on the following Indian cottons :—

C.P. No. 1, Berar, Khandesh, Nanded, Latur, Muttia, Punjab-American, Broach, Jagadia, Surat, Navsari, Dholleras, Kalagin, Kadi-Viramgam, Westerns, Farm Westerns, Kumpta, Upland, Bijapur, Bagalkote, Cambodia, Tinnevely, Karunganni, A. R. Kampala, A. R. Busoga, A. R. Jinja, Bailhongal, Karunganni, Nandyal, Northern Cambodia, Bengals, Ujjain (Ujjain), Ujjain (Mandsaur), Moglai, Miraj, Tiruppur Cambodia, Tiruppur Cambodia, Hubli Kumpta, Hubli Upland, Kampala (African), Busoga (African), Jinja (African), Jagadia, Bawla, Kadi, etc.

"REPORT OF THE XIVTH INTERNATIONAL WOOL CONFERENCE, LONDON, JUNE, 1938." Report on Economic and Commercial Conditions in Ecuador. Report on the Economic and Commercial Conditions in the Republic of Colombia. The two latter publications are printed and published for the Department of Overseas Trade by H.M. Stationery Office, York House, Kingsway, London, W.C.2.

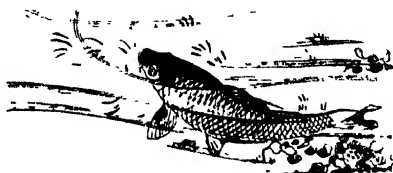
"SHIRLEY INSTITUTE MEMOIRS." Volume XVI, 1937-38. Published by the British Cotton Industry Research Association, Didsbury, Manchester.

"THE KARACHI COTTON ANNUAL," 1937-38.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN ECUADOR." By H.M. Minister and Consul-General at Quito.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN THE REPUBLIC OF COLOMBIA." By the Commercial Secretary of H.M. Legation at Bogota.

Both these reports are printed and published for the Department of Overseas Trade by H.M. Stationery Office, York House, Kingsway, London, W.C.2, and priced at 9d. each.



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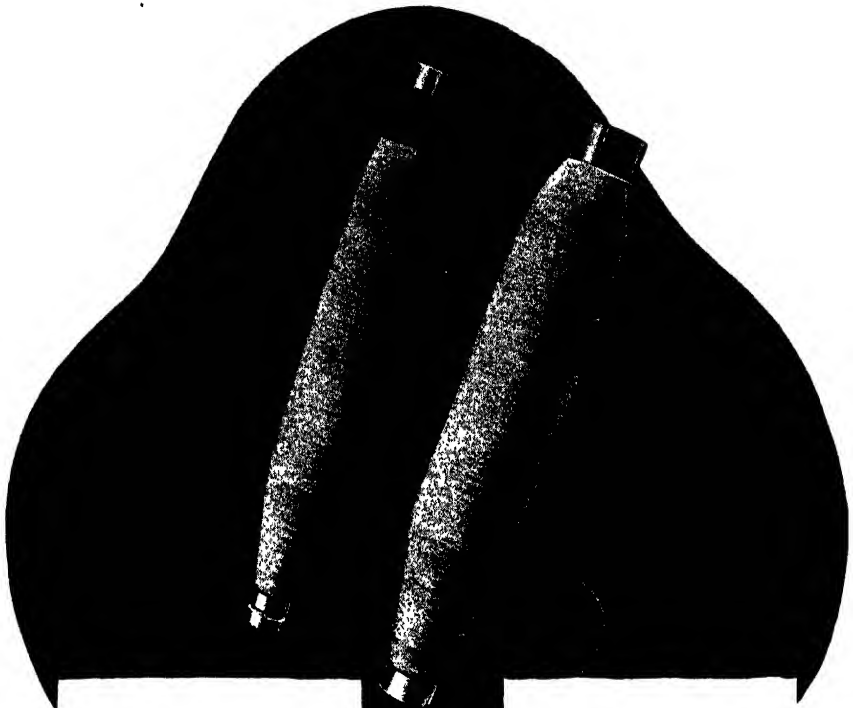
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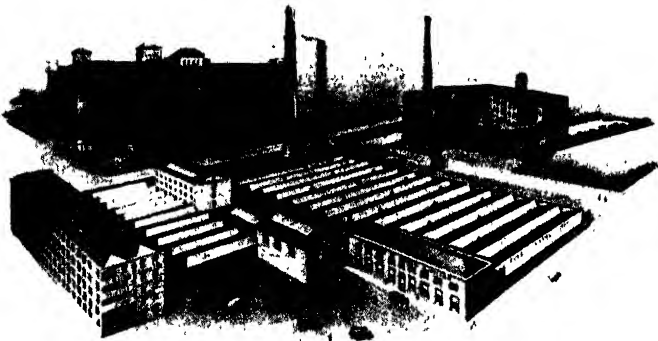
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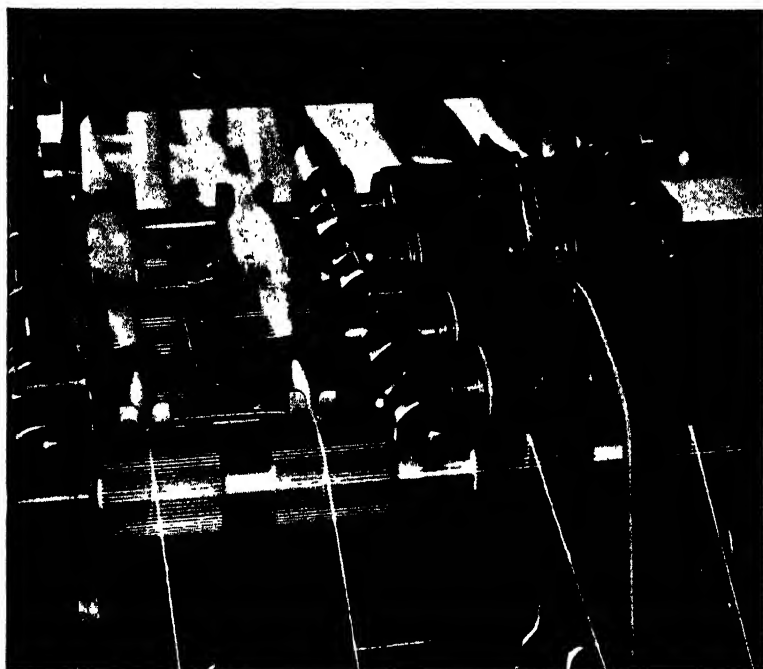
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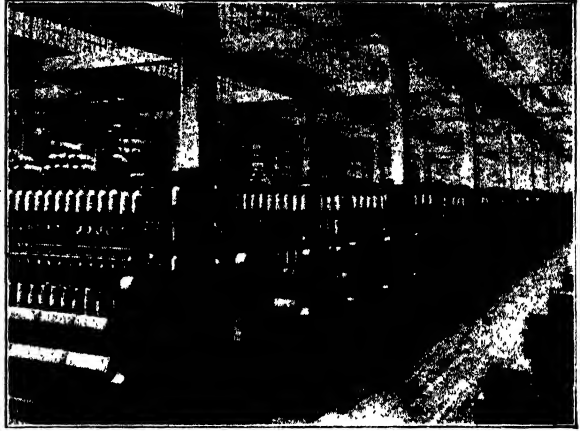
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COMMITTEE'S COMMUNICATIONS

As mentioned in the last issue of the *International Cotton Bulletin*, during the first week in August the various Committees of the International Federation will be occupied in Zurich.

On August 3 the Sub-Committee for Standardisation of Textile Terms and Textile Testing will meet to discuss the work of the International Standards Association relating to cotton textiles during this year at Breisgau and at the recent conference held in Helsinki.

The Joint Egyptian Cotton Committee meets at the same hotel on August 4, and the following subjects among others will be found upon the agenda :—

Report on Progress of Alexandria Testing House since Inauguration of New Humidity Agreement by the Manager and Trustees representing the International Federation.

Review of the first nine months working of the Milan Humidity Agreement and consideration of extension of the same.

Proposed Universal Egyptian Cotton Standards for Grade.

Report by the Egyptian Section upon the work of the Botanical Section of the Ministry of Agriculture.

Report by the Spinners' Section upon spinning tests on the more recent varieties of Egyptian cotton, such as Giza 12, Giza 26, Bahtim Abiad, etc.

The Egyptian Government Cotton Policy. Report by the Egyptian Section.

Report on Spinners' Complaints of Black Flecks in Upper Egyptian Cotton.

If time does not permit the Committee to deal with all the subjects upon the agenda the Committee will meet again either on Sunday (6th) or Monday, August 7.

The International Cotton Committee will meet on Saturday, August 5, and among others it is hoped to deal with the following subjects on the same date :—

American Cotton Supply in relation to United States Government Cotton Policy.

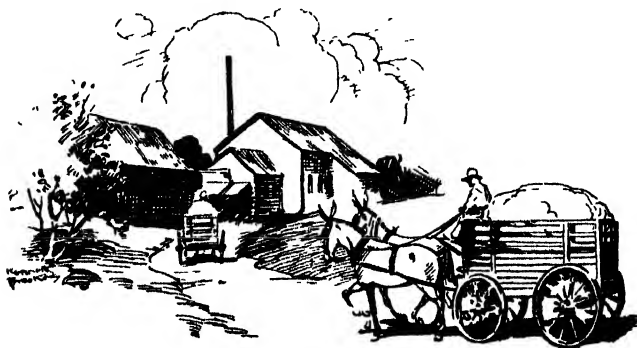
American Futures Price Disparity.

Improvement of American Cotton. Reports from members who have used One Variety Cotton.

Appointment of Congress Sub-Committee for next Congress (England, 1940).

The President of the International Federation, Dr. Hendrik van Delden (Germany), retires according to rota having completed his two years' term as President. According to the Statutes an English President is now to be appointed, a Continental Senior Vice-President and an English Junior Vice-President.

From replies received already from the members of these Committees it is anticipated that at least forty delegates will attend the various conferences and there will be fourteen nations represented.





ARGENTINE

Argentine cotton production has been reduced to 299,789 bales of 478 lbs., according to the second official forecast of the Argentine Government. This estimate represents a decrease of 23 per cent. compared with the first forecast of 387,419 bales for the 1938-39 crop, but is nevertheless 7 per cent. higher than the corresponding forecast for the 1937-38 crop. The final estimate, made in December, is usually lower than the earlier forecasts. While there has been an increase in production in recent years, the expansion has not been so great as had been anticipated.

Excessive rains and insect damage were the main factors causing the reduced forecast. Frequent rains in the main producing areas favoured the spread of the army worm because, with the excessive moisture, spraying was only relatively effective. Rains also delayed the ripening of the bolls and thus hampered the harvesting of the crop. It is further reported that in the Territory of Chaco, the main producing area in Argentina, low yields and poor quality have been obtained from the early sown fields.

ARGENTINA : COTTON ACREAGE AND PRODUCTION, 1938-39 SEASON, and 1938 EXPORTS, WITH COMPARISONS

Season			Area		Produc-	Calendar	Exports *Bales
			Planted Acres	Harvested Acres	tion *Bales	Year	
Average 1929-30 to					Average		
1933-34	..	..	355,356	—	161,627	1930-1934	118,590
1933-34	..	..	481,845	—	199,968	1934 ..	125,044
1934-35	..	..	707,069	—	295,352	1935 ..	167,554
1935-36	..	..	909,328	763,129	373,385	1936 ..	226,940
1936-37	..	..	1,015,333	713,452	143,760	1937 ..	57,559
1937-38	..	..	1,047,778	814,671	237,271	1938 ..	†103,132
1938-39	..	..	1,004,956	—	‡299,789	1939 ..	—

Compiled from official sources.

* In bales of 478 lbs. † Preliminary. ‡ Second forecast.

(U.S. Department of Agriculture)

In the Chaco area during March and April, rain fell on nineteen days and increased the normal rainfall by 31 per cent. During these two months 295 mm. of rain was deposited, compared with 105 mm. in 1938, and 125 mm. in 1937.

The estimate for the various districts is as follows :—

Chaco	..	..	..	51,500 tons
Corrientes	..	..	..	5,500 "
Formosa	..	..	..	4,800 "
Santiago del Estero	..	..	..	1,900 "
Other Districts or Provinces	..	..	..	1,300 "
Total	..	..	..	65,000 "

During the four months ended April last the Argentine cotton industry consumed 8,829,645 kilos of raw cotton. Assuming consumption proceeds at the same rate during the remainder of the year, the total annual consumption will be approximately 26,500,000 kilos, leaving a balance of 38,500,000 kilos for export or about 192,000 bales, as against last year's exports of 22,361,087 kilos of about 111,000 bales. Exports up to and inclusive of April during this year amount to 912,243 kilos, but the heavy shipments usually take place in the months of July, August, September and October.

Successful results are reported to have been obtained from the sowing of a special type of cotton seed in the dry districts of the province of San Luis. The experiments were made with areas of 1 to 5 hectares, namely with seeds of the same cotton which is specially resistant to a dry climate and is planted in the north-eastern part of Texas in U.S.A. between the states of Oklahoma and New Mexico. The results obtained this year in San Luis are stated to be outstanding, more especially as last year and the beginning of this year were periods of exceptional dryness. This is the first time cotton has been planted in this region. With its low rainfall and lack of irrigation, San Luis was reckoned to be one of the poor provinces and was devoted chiefly to arable farming and cattle breeding. The Junta Nacional del Algodon (National Cotton Committee) regards favourably the prospects of growing cotton in San Luis. Argentine papers point out that cotton growing in the dry districts of Texas (where 600,000 bales are produced per annum) is cheaper than in the other areas which enjoy a higher rainfall or possess irrigation systems.

BRAZIL

The Ministry of Agriculture has issued its official estimate of production for the 1938-39 cotton crop, details of which are given hereunder :—

NORTHERN ZONE				Kilos
States				
Pará	..	..	..	2,000,000
Maranhão	..	..	..	9,000,000
Piauí	..	..	..	3,000,000
Ceará	..	..	..	28,000,000
Rio G. do Sul	..	..	..	22,000,000
Paraíba	..	..	..	35,000,000
Pernambuco	..	..	..	25,000,000
Alagoas	..	..	..	11,000,000
Sergipe	..	..	..	5,000,000
Baía (Northern Zone)	..	..	..	1,100,000
Total	..	..	..	141,100,000

SOUTHERN ZONE				Kilos
States				
Baia (Southern Zone)	..	..	..	6,000,000
Rio de Janeiro	..	..	..	1,500,000
Minas Gerais	..	..	..	7,500,000
Goiáz	..	..	..	750,000
Sao Paulo	..	..	..	245,000,000
Paraná	..	..	..	4,600,000
Other States	..	..	..	500,000
Total	..	..	..	265,850,000
Grand Total	..	..	..	409,950,000

Present indications are that Brazil will harvest a cotton crop of 1,877,000 bales (478 lbs. each) during the 1938-39 season. A crop of this size would represent a decline of about 10 per cent. from the record of 1937-38 crop.

Cotton is grown in two distinct regions in Brazil, the most important producing district being in Southern Brazil and the second producing area being in North-eastern Brazil. The planting and harvesting dates in these two regions differ. In Southern Brazil, the planting period is from September through November and the harvesting period from February through May. In North-eastern Brazil, the bulk of the planting takes place in February, March and April, and harvesting in the September-November period.

The following table shows the production of cotton in Brazil for the seasons named :—

Season	Northern Brazil Bales	Southern Brazil Bales	Total Bales
1932-33	258,644	222,065	480,709
1933-34	483,278	530,377	1,013,655
1934-35	783,159	545,186	1,328,345
1935-36	826,029	931,217	1,757,246
1936-37	685,741	1,138,358	1,824,099
1937-38	707,595	1,367,127	2,074,722
1938-39	*650,772	†1,226,136	‡1,876,908

* Third official estimate. † First official estimate. ‡ Preliminary.

According to information supplied by the *Bolsa de Mercadorias* of Sao Paulo, the final out-turn of the 1938 *Paulista* cotton crop was 1,391,497 bales weighing 248,295 metric tons gross, compared with 1,147,759 bales weighing 202,618 tons for the 1937 crop.

With regard to the 1939 *Paulista* crop, classification of which commenced at the beginning of March, the quantity classified up to April 30 was 45,749 tons, of which as much as 90 per cent. was composed of types 2, 3, 4 and 5. Up to the same date last year the quantity dealt with was 32,365 tons, of which 80 per cent. was of the basic type 5 or better.

Cotton classified by the Sao Paulo Merchandise Exchange for the cotton year ended February 28, 1939, totalled 248,296 metric tons, compared with 202,618 tons in 1937-38, representing an increase of about 45,000 tons. This total corresponds with the official estimate of the

Sao Paulo crop of 250,000 tons. The 1938 crop also shows an improvement in quality 68% representing "basic" and higher types, and 32% grades below "basic," compared with 47 and 53% respectively for the preceding crop. Cotton exports from the port of Santos totalled 214,903 metric tons valued at 725,000 contos, representing an increase of about 09% in volume and 15% in value over the exports of 1937-38. Japan increased purchases by 28%, Germany by 25%, and the United Kingdom by 16%, as compared with the previous year. Germany began purchases in May and reached its quota in a few months. Japan entered the market in June, buying so heavily that by September it had surpassed Germany in the quantity taken. Total exports to Japan for the twelve months ended February 28, 1939, aggregated 65,253 tons (valued at 222,333 contos); to Germany 49,620 tons (175,054 contos); the United Kingdom 28,981 tons (92,975 contos); France 23,524 tons (78,150 contos); Italy 10,398 tons (35,585 contos); and China 15,153 (47,842 contos). Exports to the United States were only 119 tons. (Conto=1,000 milreis.)

Germany is said to be purchasing the better qualities, and it is estimated that of 50,000 metric tons exported from Santos to that country, about 45,000 were of "basic" and higher grades. When Germany completed its buying the local market had on hand an extremely large supply of inferior grades.

According to trade information all of the cotton exported to Japan was shipped in Japanese ships, and about 50% was shipped by Japanese firms.

The carry-over of exportable cotton of the 1937-38 crop is said to be negligible. Sales of Sao Paulo cotton for Germany and Hungary are said to be made against the official certificates of the Sao Paulo Merchandise Exchange, while sales to the United Kingdom are made against private types of the exporters.

(*Textile Raw Materials—U.S.D. of C.*)

According to the *New Orleans Cotton Trade Journal*, the resumption of German buying in Sao Paulo has greatly stimulated the local market and prices have risen accordingly.

Picking proceeds briskly under favourable weather conditions, and arrivals are large, justifying the expectation that crop will not stay long in the fields. During the last fortnight of May, classed receipts amounted to some 44,000,000 kilos as. against 34,000,000 kilos last season at the same period.

Grade still averages at one full type above the previous season, shortness of lower grades still continuing.

The official estimate of this crop has not yet been published but the general idea is that this crop will be somewhat smaller than last. A declaration made by the President of the Bolsa de Mercadorias de Sao Paulo, who will be one of the Members of the Brazilian Commission to the Cotton Conference, states that there is hope that this season's crop will be as big as last season, and that Sao Paulo will, this year, export nothing less than 200,000,000 kilos, of which, as it is known, a large

share goes to the Orient and another large share, it is reckoned, will go to Germany.

The local market is actually excited and keeps very firm. Sellers are holding while buyers are doing their best against a market that cannot be shaken.

Prices in the interior in the last 20 days have increased, and as it was to be expected, some ginners have a problem to solve.

Some 60,000,000 kilos have already actually left the port of Santos, and, it is estimated that sales in shippers' books, brings the total sold for export up to about 130,000,000 kilos.

Type Standard. The Piratininga cotton has been adopted as standard in the State of Alagoas, reports the *Boletim* of the *Inspeccoria de Plantas Textis*, with the Municipality of Uniao as centre of distribution for the other municipalities in the State.

The Piratininga variety was produced originally in Sao Paulo, but was acclimatised in Pernambuco and has a staple of 33-40 mm., is a white cotton and is said to be stronger than Moco.

CHINA

It is reported that the Hokushi Mensan Kaishin-kai (North China Cotton-farming Improvement Society) has drawn up a 30 per cent. increased production plan for this year compared with last year's figure and cotton planting is now going on in North China in accordance with this plan.

According to information received by the Osaka Trade Institute on May 30, however, in some districts cotton planting has not been completed yet and it is expected that a 30 per cent. increase will be difficult, the expected increase in cotton crop this year being from 15 to 20 per cent. compared with last year.

(*Japan Weekly Chronicle*)

According to a report recently received, the Japanese Overseas Ministry has drawn up a three-year cotton plan, aiming at an annual crop of 1,250,000 bales of 400 lbs. each with a view to making Japan self-sufficient in respect of her cotton requirements. 5,000,000 lbs. of cottonseed will be sent to Tsingtao, 1,500,000 lbs. to Shansi and 3,000,000 lbs. to Tientsin (North China) for distribution among the cotton growers in North China. The Ministry also plans to distribute 1,000,000 lbs. of cottonseed in Central China through the newly organised Cotton Cultivation Improvement Society.

ETHIOPIA

The Ministry of Agriculture for Italy has recently given out a statement to the effect that the production of cotton in Ethiopia during 1938 amounted to 80 tons.

COTTON GROWING IN THE FRENCH COLONIES

Cotton is by far the most important vegetable fibre imported into France from countries other than French possessions. In 1937, French raw cotton requirements totalled more than 1,300,000 bales, valued at over 2 billion francs (about \$81,000,000). Since France does not produce any cotton, it was all imported. The principal French possessions producing cotton are French West Africa, French Equatorial Africa, Syria, Morocco, and Algeria. In 1937, total production in these possessions amounted to only about 92,000 bales. The development of cotton production in French possessions is recommended by the National Economic Council in the belief that it may be produced successfully in French North Africa (where it is almost non-existent), French West Africa, and French Equatorial Africa; that it is essentially a complementary crop to French agriculture and an important raw material for French industry; and that it requires a great deal of hand labour, a condition that will enable the settling of the native population on the soil.

In order to develop cotton production in French possessions, the National Economic Council believes it is necessary to establish a system of production subsidies that will assure producers fair returns and protect them from price fluctuations during the difficult period of development. This, it is believed, will stimulate producers to plant cotton on a larger scale than at present. Funds for subsidies to be distributed in the various possessions should not exceed 50 million francs (about \$1,300,000 at current rate of exchange). The National Economic Council also recommends that the local administrations in the various possessions assist in this effort and encourage production by determining the areas most favourable for cotton, starting irrigation programmes in those districts, establishing gins under their control, and organising a fight against cotton diseases and pests.

Such measures have already been included in the decree law of June 17, 1938, regulating cotton production in Algeria, and should be extended to all other possessions capable of producing cotton.

(Extracted from "Foreign Agriculture," published by the U.S. Dept. of Agriculture)

According to information published recently in the Bulletin of the Association Cotonnière Coloniale, the total production of cotton in the French Empire during the 1937-38 season was as follows:—

Levantine States	..	..	..	71,770	quintals	against	70,687	in 1927.
Algeria	..	..	..	750	"	"	800	" "
Morocco	..	..	..	798	"	"	528	" "
Equatorial Africa	..	..	..	84,900	"	"	72,400	" "
West Africa	..	..	..	62,078	"	"	56,091	" "
Total	..	..	..	220,296	"	"	200,506	" "

MEXICAN COTTON PROSPECTS FOR 1939

Specially contributed by Curtis Vinson

Estimates by members of the trade on the extent of cotton production in Mexico for 1939 place the total at 275,000 bales, an increase of 15,000 bales over the 1938 yield.

Predictions are that domestic demand will absorb from 200,000 to 210,000 bales from the new crop, an increase of 30,000 to 40,000 bales over the requirements of the Mexican mills from the 1938 crop. Exports, in consequence, are expected to be at about the same figure—around 70,000 bales—as for 1938.

If the estimate of 275,000 bales from the 1939 plantings is realised, Mexico's cotton yield will show the first gain over preceding year since 1936 when the vast cotton holdings of private enterprise were broken up and made available to the peasants under the nation's programme of agrarian reforms.

The yield in 1936 totalled 343,000 bales, the largest single crop over the twelve year period that ended with that year. The smallest crop during that time was for 1932 when only 88,000 bales were harvested. Production jumped to 226,000 bales for 1933, dropped to 193,300 bales in 1934, increased to 217,270 bales in 1935, then reached the peak of 343,000 bales for 1936, as cited.

The 1937 yield dropped to 295,000 bales, a loss of 48,000 bales. The 1938 yield showed a further drop to 260,000 bales, a slump from 1937 of 35,000 bales. With favourable weather and sufficient water for the large areas dependent upon irrigation, the estimate of 275,000 bales for the current year may be exceeded, cotton men say.

The 1939 crop will see a gain in yield from imported certified seed, most of which was obtained from cotton seed farms in Texas. Plantings in the Matamoros area, just south of the Texas border, are reported virtually 100 per cent. from imported seed. The country's entire crop is now planted. The fibre of the Mexican yield runs from 15/16ths to 1 inch in length. The factor of weather being the uncertain thing it is, predictions as to class and character of the coming yield are qualified at present by various ifs and ands.

The rich Laguna region, as usual, is expected to produce the major regional harvest, the yield for that area being expected to reach 125,000 bales.

Present reliable estimates for the 1939 harvest by areas are as follows :—

Region	Yield in Bales
Laguna	125,000
Matamoros Area	45,000
Mexicali—Lower California	42,000
State of Chihuahua—Delicias, Saucillo, Juarez, Ojinaga	45,000
West Coast—Sonora and Sinaloa	10,000
All other areas, including Veracruz, Don Martin in the State of Nuevo Leon, Palestina in the State of Coahuila, Oaxaca, Guerrero and Jalisco	8,000
Total	275,000

Lack of water in recent years has been a materially contributing factor in loss in yield in various areas. The Don Martin region, for example, formerly produced as much as 40,000 bales. But for the past three years, water shortage has cut down its yield heavily. As shown by the table Don Martin and other regions grouped with it will produce, according to estimates, only 8,000 bales this year.

Mexico's cotton spinning and weaving industry is supplied almost entirely by the domestic yield. Such imports of raw ginned cotton as entered the country during 1938 were supplied almost wholly by Egypt, which furnished 89 per cent. by volume and 91 per cent. by value of the total. Total imports of cotton reached only 758,000 lbs., valued at approximately \$150,000. France, Palestine and the United States supplied small quantities of raw ginned cotton, with the United States and Great Britain furnishing very negligible quantities of unginned raw cotton, carded cotton and cotton fleece.

According to a recent survey of crop conditions, cotton production in Mexico for the current season will be approximately 15,000 bales more than that of last year. The total production will be about 275,000 bales, of which 125,000 bales will be in the Laguna district, adjacent to Torreon.

Areas in the State of Chihuahua, principally in the irrigated valleys of the Conchos and Rio Grande, will produce an estimated total of 45,000 bales, and in the irrigated sections of the State of Tamaulipas about 45,000 bales will also be obtained.

The Mexicali district, lower California, will have an estimated yield of 42,000 bales; the Fuerta and Sinaloa river valleys of the West Coast 10,000 bales, and the States of Vera Cruz, Oaxaca and Jalisco an aggregate of 8,000 bales.

The textile mills of Mexico are expected to require approximately 200,000 bales of the season's crop. The picking season is well advanced, and the grade of the lint is better than ever known in Mexico, due to the importation of large quantities of certified seed for planting from the United States.

PARAGUAY

The Paraguayan Government have decided to open a cotton experimental station, which will be under the supervision of a Brazilian cotton expert, whose duty will be to improve the quality and yield of the seed planted in that country.

PERU

It has been reported that the poor quality is the result of damage done by infestation of the stainer bug and by the leaf disease known as melaza. The intensity of infestation varied greatly in different valleys; the valleys of the Pisco and Mala Rivers were practically unaffected.

PERU : COTTON PRODUCTION, 1936-37 TO 1938-39, (In bales of 478 lbs.)				
Year		Official estimate		Trade estimate
		Bales		Bales
1936-37	.. ..	385,653		402,401
1937-38	.. ..	375,921		415,237
1938-39	.. ..	—		393,379

Preliminary figures place the 1938 area at about 400,000 acres, compared with 388,000 acres cultivated the previous year. Cotton acreage in Peru has been steadily increasing, from 304,000 acres, the 1925-1929 average, to the record of 409,000 acres in 1936. No great expansion in cotton acreage however seems probable. Cotton can be grown only on irrigated land along the coast. This land is scarce and high in price; and it is reported that, because of the over-extension of cotton planting, food crops in Peru have decreased. Laws requiring the planting of certain percentages of land to food crops have already been passed, and any further extension of cotton growing might meet with opposition of a similar nature.

(U.S. Department of Agriculture)

QUEENSLAND

The Queensland Cotton harvesting began early in March. A yield of between 14,000 and 15,000 bales is expected. Following two unfavourable seasons (about 9,600 bales last year and 8,500 the year before) this good result should help the industry considerably. Rains in March delayed harvesting to some extent, but little damage was expected to result, except a possible lowering of grades of more advanced crops.

SIAM

The production of cotton in Siam for home consumption dates back to antiquity, but the growing of cotton on a commercial scale for export is of recent origin. The first special appropriation for this purpose was made in the fiscal year 1935-36, and increasingly large amounts have been made available since then, the amount budgeted for the current fiscal year ending March 31, 1939, being 759,430 Baht (about U.S. \$340,225). Production of lint cotton in each of the last three years averaged about 1,500 metric tons (about 7,000 bales of 478 lb.); 513 tons of seed cotton were exported during the year ended March 31, 1938, of which Japan took 508 tons. During the same year, 346 tons of lint cotton were exported, of which 284 tons were shipped to Germany.

(Textile Raw Materials)

SUDAN

The Sudan Government Agriculture and Forests Department, Khartoum, have furnished the following Cotton Progress Report for May, 1939. Season 1938-39.

COTTON GROWING

	Estimated Total Yield. (Bales of app. 400 lbs. Lint)		Picked to Date		Area under Crop, Feddans	
	1938-39 May	1937-38 June	1938-39 May	1937-38 May	1938-39 May	1937-38 June
SAKELLARIDIS IRRIGATED :—						
Gezira :—						
S.P.S. Ltd.	b 184,564	190,572	184,564	190,572	167,066	167,982
K.C.C. Ltd.	b 43,973	46,172	43,973	46,172	38,255	38,671
Abdel Magid	b 5,196	2,605	5,196	2,605	4,515	1,720
Gondal	b 475	493	475	493	390	390
White Nile :—						
Dueim	b 375	565	375	565	541	526
Private Estates	b 7,249	10,185	7,249	10,185	9,515	a 11,629
Tokar	21,250	7,029	20,957	7,029	40,000	20,000
Kassala	15,000	15,633	14,684	15,373	33,292	31,850
Total Sakellaridis Irrigated	278,082	273,254	277,473	272,906	293,574	272,768
AMERICAN IRRIGATED :—						
Northern Province :—						
Dongola (Government Estates)						
Berber (Government Estates)	b 2,264	2,141	2,264	2,141	2,061	2,177
Zeidab S.P.S.	b 2,375	3,078	2,375	3,078	2,018	2,420
Other Private Estates	b 5,217	5,243	5,217	5,243	5,554	5,159
Sagias	b 551	1,621	551	1,621	600	1,373
Sagias	b 60	—	60	—	200	570
Khartoum (Private Estates)						
.. ..	b 21	—	21	—	73	153
Total American Irrigated..	b 10,488	12,083	10,488	12,083	10,506	11,852
AMERICAN RAIN GROWN :						
Kordofan	b 25,391	28,967	25,391	28,967	115,000	116,000
Upper Nile	b 921	722	921	722	6,000	7,500
Equatoria	b 2,636	3,146	2,636	3,146	16,260	18,698
Total American Rain Grown	28,948	32,835	28,948	32,835	137,260	142,198
Total All Varieties ..	317,518	318,172	316,909	317,914	441,340	426,818

a Includes Khartoum Estates. b Final.

COTTON PRODUCTION IN TURKEY

The cotton crop for the 1938 season is placed at 66,471 tons. Of this total the Turkish spinning mills have used 22,274 tons, 42% (9,366 tons) of which has been consumed by the spinning mills controlled by the Sumer Bank. Fourteen per cent. of the total cotton produced in the country was purchased for use by the factories controlled by the State. In 1937, 49% of all the cotton consumed in the country was indigenous cotton and 51% of it was of foreign origin. In 1938 these figures were 40% and 60% respectively. It is the cotton of good quality among Turkish exports which enjoys the largest measure of success in foreign markets. In comparing exports of indigenous cotton this season with those of last season, it is noticeable that the current season's exports exceed last season's by 9%. All this has resulted in Turkish spinners finding it difficult to obtain sufficient supplies of good quality native cotton for their own use.

TANGANYIKA

It was reported in April that cotton picking had commenced in the Lake Province with the promise of fair yields. The indications pointed to good crops of cotton in the Northern and Eastern Provinces, but in the Tanga Province it was stated to be dependent on further rain.

(International Institute of Agriculture)

U.S.A. CONVENES WORLD COTTON CONFERENCE

Invitations to the Governments of the ten major cotton exporting countries asking them to send representatives to a meeting in Washington, beginning September 5, to discuss possibilities of working out a world agreement for that commodity have been extended by the State Department on behalf of Secretary of Agriculture Wallace.

Countries to which the invitations were extended are Argentina, Brazil, Egypt, France for the French cotton exporting colonies, Great Britain for its cotton exporting countries, India, Mexico, Peru, Sudan and Union of Soviet Socialistic Republics.

In the formal announcement of the issuance of invitations made by the Department of Agriculture it was stressed that the proposed discussions will be of an "exploratory character." No specific plan for international co-operation in cotton production and trade will be developed at the meeting.

Officials said that they expected, however, that all aspects of the current world cotton situation will be studied thoroughly with a view to determining whether it may be advisable to recommend to the governments involved that a conference to work out a specific plan for international collaboration in the field of cotton production and trade be convened at a later date.

According to the *New York Journal of Commerce*, action taken by the Administration in calling the world cotton conference is expected to defer any possible use of an export subsidy on that domestic crop at least until after the international meeting is held.

Whether this is done or not, observers feel confident that the Administration would not enter into a subsidy programme for the commodity after issuing invitations to a conference at which it is expected to lay the groundwork for world production control.

U.S.S.R.

On May 10 the plan for cotton sowing had been practically completed; 4,883,000 acres had been sown, against 4,863,000 in 1938, or 99 per cent. of the plan in both years. The average area sown in 1933 to 1937 was 4,977,000.

Weather conditions were favourable for crops, and on June 10, cotton in Central Asia, according to the report of the Commissariat for Agriculture, was almost everywhere at the stage of bud formation. Crop condition was good in Uzbekistan and Tadjikistan and on the whole satisfactory in other areas. Earthing up, cleaning and irrigation were carried out in good conditions.

In the areas recently assigned to cultivate cotton (Ukraine, North Caucasus and Crimea) the crop condition of cotton was good at the beginning of June.

(*International Institute of Agriculture*)

VENEZUELA

The Department of Agriculture of Venezuela is endeavouring to improve the various branches of agriculture, including cotton growing. It has asked for bids on several cotton ginneries and is said to be interested in mechanical cotton picking machines. It is said that the supply of domestic cotton may be inadequate and may bring about import permits for a certain quantity of foreign cotton to assist the local cotton manufacturing industry. Domestic mills find it difficult to meet the competition of some imported cotton goods (despite the tariff), partly owing to the high prices for domestic cotton.

The annual production of cotton for the past decade is said to have averaged about 2,600 metric tons (12,000 bales of 478 lb.) of a low-grade short staple. The cost of production is relatively high and the domestic crop sells under the protection of a high tariff, at a price equivalent to about 25 cents (U.S. currency) per lb. *(Textile Raw Materials)*

WEST INDIES

As a result of proposals made last year to establish a Central Ginnery at Carriacou, the largest island in the Grenadines between St. Vincent and Grenada, it has been decided to introduce legislation to create a Board which would be empowered to arrange under contract for ginning, baling and marketing all cotton grown in the island. The Government has invited tenders for dealing with the cotton crop, estimated at 250,000 lb. per annum, in a Central Ginnery situated at Hillsborough, and equipped to the satisfaction of the Board of Control.

THE FUTURE OF COTTON PRODUCTION IN BRAZIL

The following is extracted from an article by Mr. K. C. Davis, which appeared in a recent issue of *Current Farm Economics*, Oklahoma :—

The area of Brazil is larger than the territory occupied by the continental United States. In this wide expanse of 3,286,770 square miles only 31,067,000 acres or 1.5 per cent. are cultivated, excluding forests and many thousands of acres of pastures sodded with tame grasses. Approximately 50 per cent. or 1,737,000 square miles are covered by forests.

In this expanse of land, populated by many races but chiefly whites, live approximately 45 to 48 million people. The population of the cotton producing states in the United States excluding California, Arizona, New Mexico and Missouri is 25.5 million. However, the area in Brazil suited to cotton production will not comprise an area this large, for it is estimated to equal approximately the combined area of Oklahoma and Texas. These two factors, population and land area, are the basic facts which must be considered in any discussion of Brazil's cotton-producing potentialities.

These conditions may be considered the two limiting factors. The extent, however, that these will be effective depends on many secondary factors, including (1) the quality of the population, and (2) the available capital.

One of the chief limiting factors until the present has been an inadequate supply of intelligent labour. The population of Brazil in the last census was 52 per cent. white, 26 per cent. mixed, 13 per cent. Indian, and 9 per cent. Negro. To increase the supply of labour the various states and the Federal Government have offered inducement to European immigrants to settle in Brazil. These immigrants from the continent of Europe have settled in the Southern State of Sao Paulo. The immigration reached such proportions that laws were later passed prohibiting this wholesale movement. The settlers were at fault for this, for they formed colonies of their own nationality and refused to conform to the laws of the government. In many cases they were openly rebellious. Through the present influx of capital to supplant labour, the introduction of modern machinery and the shift of labour from the coffee plantations it appears that the labour problem has been solved.

The extent to which further emphasis upon cotton production becomes desirable will depend on the relative prices of coffee and cotton, and the expansion of cotton acreages is dependent not only upon the relative prices but also upon the amount of increase in capital available for use in bringing pasture, brush and woodlands into cultivation. There is a definite need of capital in Brazil to develop this great area. The amount of capital that will be made available will be determined somewhat by the general stability of the country. The International Federation of Master Spinners' and Manufacturers' Associations as early as 1922 sent representatives or agents to that country to do educational work on the methods of cultivation, ginning and preparation of cotton for market.

In summary, it appears that the impetus to expansion of Brazil's cotton production resulted chiefly from a continued depression in the coffee industry and the subsidy given domestic production in Brazil as a result of Brazilian Government's operation of the exchange. Because coffee prices have remained depressed and Brazilian cotton has found a ready market, the cotton expansion has been continued. As long as the market remains as it is or increases in magnitude Brazilian cotton production is likely to increase, especially with continued encouraging governmental policies.

The chief limiting factors to sustained expansion seem to be the amount and quality of production factors, *i.e.*, land, labour and capital. There is an abundance of land yet to be brought into cultivation, and the labour question has apparently been answered, temporarily at least, by immigration. The supply of capital, however, is still relatively low, although there has been some movement of capital into Brazil.

THE ORIGIN OF THE MONTSERRAT (SEA ISLAND) STRAIN

A correspondent recently forwarded to the West India Committee Circular the following interesting article dealing with the origin of the Montserrat strain :—

An account of the work done in Montserrat may be of interest, for the strain known as " Montserrat " is now cultivated throughout the Leeward Islands and is under trial for adoption or crossing, in other islands. The strain shows exceptional qualities of strength, regularity of length, medium fineness and high yield.

At the opening of the century economic conditions in Montserrat were at a very low ebb, but the introduction of cotton turned the tide once more towards prosperity and cultivation was rapidly taken up by both the estates and the large peasant population. It was exceedingly fortunate for the island in these circumstances, that there should have arrived, from Kew in 1904 as Curator of the Botanic Station, Mr. William Robson. His influence and leadership in developing the new industry and introducing measures of control were of inestimable benefit. By his indefatigable energy, keen observation and careful methodical application Robson produced the pure " Montserrat " strain. Under the advice and guidance of Dr. S. C. Harland the strain was brought to the high level which places it as the most valuable in the islands and to the market generally today.

In 1909, a small sample of seed of unknown origin was received by Robson from Mr. J. R. Bovell, Superintendent of Agriculture, Barbados. Some years later it became known that the seeds had been sent to Mr. Bovell by a firm of spinners, Messrs. William Heaton & Sons, who had found them in a lot of particularly desirable Carolina cotton. So the " Montserrat " strain may be regarded as the return of " bread cast upon the waters " in 1785, when seed of a superior kind of West Indian cotton was sent from the Bahamas to the United States.

On the first plantings showing marked vigour and qualities suitable for Montserrat conditions Robson pursued the selection and re-selection of the strain until, in the season 1915-16, he produced what he named the H.23 strain and Dr. Harland confirmed his view that this was an exceptionally good strain. From that time Montserrat cotton has been recognised as of particular value to the spinning trade, and, as mentioned before, has been adopted for cultivation throughout the Leeward Islands.

There is no doubt that the lamentably early death of Robson in 1923 was a heavy loss to Montserrat and caused a halt in the further development of the strain, but in spite of many vicissitudes Montserrat cotton has maintained its position. Pure strain seed is now produced at the Cotton Breeding Station in Montserrat and the work is financed by the local Government and the West Indian Sea Island Cotton Association (Inc.) formed in 1932. The breeding work is carried on under the direction of the Cotton Adviser to the Commissioner of Agriculture.

From small beginnings the importance of cotton to the island of Montserrat today may be realised from the following figures. During the last five years the area planted has approached 4,500 acres, and an average yield of about 700,000 lb. of lint obtained, reaching a maximum in 1935 of over 1,000,000 lb. It should not be forgotten that the creation of, and the existence of, the West Indian Sea Island Cotton Association during its first critical years was very largely due to the initiative, energy and sacrifice of Montserrat cotton growers. The work carried on by the Association is of vital importance to the Sea Island Cotton industry not only in the West Indies, but in its various applications in the United Kingdom and throughout the Empire.

PRODUCTION OF COMMERCIAL COTTON IN THE WORLD

The following tabulation has been compiled by the New York Cotton Exchange Service to show production of commercial cotton in the world. The figures do not cover large amounts of cotton grown in India, China and some other countries for use in the households of people in the producing countries. American cotton is in running bales and foreign in equivalent 478 lb. bales.

Country	1937-38	1938-39	Country	1937-38	1938-39
United States :			Asia (contd.)		
Ginnings ..	18,252,000	11,621,000	India ..	4,042,000	4,350,000
Adjustment <i>b</i> ..	180,000	179,000	Ceylon ..	312	200
Total U.S. ..	18,412,000	11,800,000	Burma ..	108,000	85,000
Other N. America :			Siam ..	10,800	5,100
Mexico <i>c</i> ..	298,000	233,000	Fr. Indo-China ..	6,000	6,000
Salvador ..	4,811	5,400	Dutch East Indies ..	11,500	11,500
Nicaragua ..	5,230	3,000	Chosen ..	212,814	187,083
Haiti ..	20,643	18,000	Japan ..	994	995
Puerto Rico ..	512	826	Manchuria ..	74,344	77,406
Br. W. Indies ..	3,852	4,125	China ..	2,400,000	1,500,000
Others ..	1,699	1,688	Total Asia ..	11,911,504	10,426,138
Total Other American	334,747	266,039	Africa :		
South America :			Egypt ..	2,259,000	1,600,000
Columbia ..	12,914	12,000	Morocco ..	250	235
Venezuela ..	13,375	11,992	Fr. West Africa ..	21,908	222,000
Ecuador ..	14,339	18,523	Gold Coast ..	50	50
Peru ..	381,739	393,746	Togoland ..	7,010	7,000
Paraguay ..	43,518	43,000	Nigeria ..	26,436	23,000
Brazil ..	2,075,000	1,877,000	Ang.-Eg. Sudan ..	277,648	270,000
Argentina ..	237,272	290,792	Eritrea ..	1,000	1,000
Other ..	75	75	Italian Somaliland ..	3,000	3,000
Total South American	2,778,232	2,656,128	Fr. Equatorial Africa ..	36,897	237,000
Europe :			Belgian Congo ..	179,140	198,474
Spain ..	11,000	11,000	Uganda ..	351,464	251,046
Italy ..	19,508	43,815	Kenya ..	15,470	15,000
Greece ..	93,645	71,488	Tanganyika ..	48,536	44,351
Yugoslavia ..	3,174	4,910	Angola ..	12,729	15,000
Bulgaria ..	47,002	34,969	Rhodesia, South ..	444	450
Rumania ..	1,978	3,667	Nyasaland ..	10,530	11,720
Others ..	22	25	Port East Africa ..	37,000	43,000
Total Europe ..	176,329	169,874	Union South Africa ..	2,000	2,000
Asia :			Others ..	434	259
Russia <i>d</i> ..	3,700,000	3,800,000	Total Africa ..	3,291,555	2,545,185
Turkey ..	232,000	200,000	Australia, etc. ..	9,987	12,050
Cyprus ..	3,908	2,000	Others ..	50	50
Syria and Lebanon ..	25,828	25,000	Total Australia, etc. ..	10,037	12,100
Iraq ..	17,004	9,854	Total Foreign Countries	18,502,404	16,075,464 <i>e</i>
Persia ..	166,000	166,000	Total—World ..	36,914,404	27,875,464 <i>e</i>

a Very tentative estimate.

b Adjustment for city crop, end-season ginnings, etc.

c Exclusive minor exports to U.S. which counted in United States production.

d Includes some cotton grown in European Russia.

e This is a revision.

BRITISH EMPIRE COTTON GROWING CORPORATION ANNUAL REPORT, 1937-38

The following is extracted from the Corporation's Annual Report for the year 1937-38, submitted to the annual general meeting on May 19, 1939 :—

The fact that the total number of bales produced in the Empire fields other than India in 1937-38 reached a new record must not be taken as evidence that there has been a general expansion of cotton-growing or that the season was on the whole a good one. Indeed, more detailed examination of the figures shows that there was actually a falling-off in production in most countries, but the remarkable increase of nearly 80,000 bales in the Uganda crop, which reached a total of 417,000 bales, has more than off-set decreases elsewhere.

Since the output of Uganda and the Sudan together accounts for over 80 per cent. of the cotton produced in the countries included in the Crop Table at the end of the Report, a general reference to the conditions of last season and the future prospects in these two important areas may appropriately be made.

Mention was made last year of the special attention that is being devoted by the Department of Agriculture, Uganda, to the risk of loss of soil fertility and to the evils of erosion, and it is satisfactory to record that these questions have been taken up with vigour. If adequate control measures are adopted, there is no reason why the Uganda cotton crop should not continue to increase in future years. There will undoubtedly be checks, as in the present season, for example, when planting was delayed by unusually dry weather with a result that the crop may not exceed 300,000 bales. But there is still good land available for expansion, particularly in parts that were evacuated many years ago on account of sleeping sickness, but could probably be cleared and cultivated, if required, now that more has been learned of the effect of clearing the bush on the control of tsetse fly. Cultivators have naturally still much to learn concerning such matters as the best spacing of plants, sowing on contour ridges to check erosion, and other operations, and increasing use is being made of Africans to give this instruction.

In the belief that it is largely to the provision of facilities for Africans to equip themselves for posts in the technical services that Uganda and the neighbouring countries must look for their continued development, the Corporation have made a substantial grant towards the capital cost of building the new Higher College at Makerere for giving advanced education to Africans, ultimately it is hoped to university standard. The Corporation's contribution has been earmarked at their request for the erection and equipment of a biological laboratory, which is essential for the training of those men who hope to qualify for employment in an Agricultural Department.

The Sudan also had a successful year. In the Gezira, the irrigated area where the greater part of the crop is grown, the yields per acre

EMPIRE COTTON CROPS FOR THE YEARS 1928-38, EXCLUDING INDIA

(In Bales of 400 lbs.)

The seasons are given as covering two years (*e.g.*, 1927-1928) because in the majority of the countries named planting takes place in one calendar year and picking in the next. In a few of these countries, however (*e.g.*, Tanganyika, Cyprus, Malta and some of the West Indian Islands) the crop is harvested in the same year as that in which it is planted. In such cases the figures should be read as relating to the crop grown and harvested in the *latter* of the two years at the head of the column.

Country	1927-28	1928-29	1929-30	1930-31	1931-32	1932-33	1933-34	1934-35	1935-36	1936-37	1937-38	
(1) Anglo-Egyptian Sudan	126,115	161,536	137,769	120,310	234,964	137,384	157,625	296,131	248,285	332,687	331,639	(1)
(2) Uganda	138,486	204,057	129,969	191,305	203,265	294,828	285,986	253,242	321,348	338,391	417,179	(2)
(3) Kenya	1,241	1,984	1,518	737	1,735	4,277	6,750	8,774	16,165	22,925	22,910	(3)
(4) Tanganyika	32,954	27,785	23,135	11,351	18,039	30,834	39,009	58,540	67,369	61,783	44,250	(4)
(5) Nyasaland	4,470	6,095	9,331	4,205	5,067	5,942	10,713	21,006	13,730	13,908	17,000	(5)
(6) Northern Rhodesia	17	—	—	—	—	—	—	—	—	—	43	(6)
(7) Southern Rhodesia	90	280	1,481	1,974	379	355	689	566	329	530	338	(7)
(8) Union of South Africa and Swaziland	11,013	9,774	16,213	8,123	2,801	1,860	2,440	2,966	1,983	3,397	1,132	(8)
(9) Nigeria	20,930	32,126	43,925	18,850	6,350	24,366	28,247	58,851	60,193	47,504	29,803	(9)
(10) Gold Coast	264	296	200	297	263	68	144	146	128	145	—	(10)
(11) Cyprus	2,116	3,520	4,718	2,865	1,119	913	1,865	5,214	2,993	4,670	2,151	(11)
(12) Malta	541	379	293	201	41	34	32	20	32	32	26	(12)
(13) Iraq	5,200	4,700	3,300	960	409	—	—	—	—	—	—	(13)
(14) Ceylon	202	380	248	95	47	34	92	124	293	369	355	(14)
(15) Queensland	10,266	6,296	13,999	12,228	4,975	13,903	21,924	17,653	16,631	10,649	11,935	(15)
(16) Fiji	114	271	398	266	90	8	39	29	64	65	60	(16)
(17) West Indies	4,088	5,377	5,672	5,106	2,524	2,614	3,618	4,720	4,565	4,676	6,196	(17)
	358,137	464,856	412,169	378,873	482,268	517,420	559,173	727,982	754,108	841,731	885,017	

Percent. Increase	Percent. Decrease	Percent. Increase	Percent. Decrease	Percent. Increase	Percent. Decrease	Percent. Increase	Percent. Decrease	Percent. Increase	Percent. Decrease	Percent. Increase	Percent. Decrease
29.7	11.3	8.0	27.3	7.3	8.0	30.2	3.6	11.6	5.1		

* No longer included in Empire figures.

considerably exceeded the average of the past ten years. Erratic rains adversely affected the rain-grown crops in other parts of the country; nevertheless the output slightly exceeded that of the previous season.

Another very satisfactory increase is that shown by Nyasaland. From a record crop of 21,000 bales in 1934-35 there was a serious decline to less than 14,000 bales in each of the two following seasons, largely owing to loss from insect attack. Energetic steps were taken to enforce legislation prohibiting ratooning and standover cotton in which pests are carried on from one season to another, and it is gratifying to report a recovery in production last year to about 17,000 bales. This figure includes some 2-3,000 bales which it is estimated were moved over the border into Portuguese East Africa and sold there for shipment to Portugal.

Nigeria and Tanganyika both show a rather heavy drop. In Nigeria the main cause is believed to have been the low price obtainable, which made other crops more attractive. It is doubtful whether the quantity of cotton grown in the country was actually any less than in former years; but when prices are low in the gazetted markets in which cotton is sold for export, it is not unusual for cultivators to be able to obtain more for their produce by selling it for use in the local hand-spinning and weaving industry. The existence of this industry is, in fact, a help in maintaining cotton growing in years in which the price that can be paid for the crop for export is so low that its cultivation would languish were it not for local consumption.

In Tanganyika, although the low price may have contributed to the decrease in output, the more immediate cause was the almost complete failure of the planting rains in those parts of the Territory in which cotton is the main economic crop. Reference is made later in the Report to the special effort that is being made by the Government this year to increase crop production generally. If this succeeds, and the season is favourable, it is hoped that not only will the drop in the output of cotton be recovered, but an increase recorded.

It is true that in face of the present position as regards the world's cotton crops and their consumption, the Empire cotton-growing movement cannot urge in its support that its sources of supply must be developed to the full to make up a shortage. Nevertheless, should the economic situation improve, increased consumption must follow, and it is gratifying to realise that in all the principal cotton-growing countries of the Empire organisations now exist, built up either by the local governments or by the Corporation, by means of which the supply of Empire cotton can be developed if it is required. It is perhaps as well that the fact should be realised that, cotton being an annual crop, no spectacular increase could be achieved immediately, but the Corporation, by concentrating their work on the improvement of varieties to suit local conditions and on possible methods of reducing damage from insects, are doing their utmost to ensure that the highest possible yields are obtained from whatever acreage it may be thought desirable to put under the crop.

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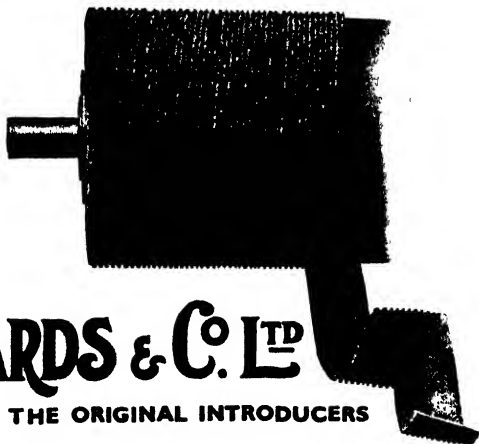
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OFFICIAL ACREAGE REPORT, 1939

A report issued on July 8, by the Washington Department of Agriculture on the cotton acreage under cultivation on July 1 indicates a decrease of 0.3 per cent. on the area planted last year. The total is returned at 24,943,000 acres, comparing with 25,018,000 acres, the revised estimate of last year's planted acreage, 34,471,000 acres in 1937, and 30,903,000 acres in 1936. Lower California is estimated to have 104,000 acres under cotton, against 94,000 acres last year, but these are not included in the United States total.

The following are the acreage details by States (in thousands) :—

	1939	1938	1937	1936
Missouri	376	362	569	414
Virginia	36	42	67	54
North Carolina ..	787	884	1,111	973
South Carolina ..	1,263	1,263	1,705	1,416
Georgia	2,064	2,064	2,674	2,299
Florida	78	82	120	90
Tennessee	742	742	995	837
Alabama	2,121	2,079	2,705	2,335
Mississippi	2,648	2,622	3,495	3,010
Arkansas	2,208	2,165	3,099	2,764
Louisiana	1,151	1,140	1,575	1,409
Oklahoma	1,854	1,733	2,471	2,501
Texas	8,980	9,163	12,769	12,080
New Mexico	99	97	162	118
Arizona	180	203	209	208
California	334	356	624	370
Other States	22	21	31	25
Total	24,943	25,018	34,471	30,903
Georgia Sea Island (a) .. }	19.4	{ 16 1		
Florida Sea Island (a) .. }		{ 15 0		
Arizona Egyptian (a) ..	40	44		
Lower California (b)				
(Old Mexico)	104	94		

a Included in State and United States total.

b NOT included in California figures, NOR in United States total.

The acreage of cotton in cultivation in the United States on July 1 is estimated by the Crop Reporting Board to be 24,943,000 acres, which is 3/10ths of one per cent. less than the 25,018,000 acres on July 1, 1938, 32.2 per cent. less than the 1928-37 average, 14.4 per cent. less than the 1934-38 average. If the ten-year average 1929-38 percentage of abandonment is applied to the estimated acreage in cultivation on July 1, 1939, an acreage of 24,424,000 is indicated for harvest. This will be only slightly more than the 24,248,000 acres harvested in 1938, which is the smallest acreage harvested since 1899. While very little change occurred in the total of the United States acreage of 1939 in comparison with 1938, substantial changes took place in some States. In the group showing a reduction, Virginia led with 15 per cent., followed by North Carolina and Arizona with 11 per cent., California 6 per cent., Florida 5 per cent. and Texas 2 per cent. Georgia, Tennessee and South Carolina were estimated to have the same acreage as last year. One per cent. increase was shown in Mississippi and Louisiana, while an increase of 2 per cent. was indicated in Arkansas, Alabama and New Mexico. Missouri shows an increase of 4 per cent. and Oklahoma 7 per cent. over 1938, due to extremely low yields last year. The 1939 Sea Island acreage is much smaller than 1938 in Georgia and Florida, where most of the crop is produced. However, small acreages are being grown this year in South Carolina, Alabama, Mississippi, Arkansas, Louisiana and Texas.

No report on probable production of lint will be made until August 8.

U.S. FINAL 1938 COTTON CROP ESTIMATES

The following are the revised estimates of the cotton crop of 1938, as released by the Crop Reporting Board of the United States Department of Agriculture on May 25, 1939:—

STATE	Area in Cultivation July 1st		Area Picked		Yield of Lint Cotton Picked per acre		Production (in thousands of 500 lb. gross wt. bales)	
	1937 Thous.	1938 Thous.	1937 Thous.	1938 Thous.	1937 lb.	1938 lb.	1937 Bales	1938 Bales
Missouri	569	362	558	357	346	450	404	336
Virginia	67	42	66	40	312	149	43	12
N. Carolina .. .	1,111	884	1,103	857	338	216	780	388
S. Carolina .. .	1,705	1,263	1,695	1,243	289	249	1,023	648
Georgia	2,674	2,064	2,661	2,009	270	203	1,500	852
Florida	120	82	118	76	162	163	40	26
Tennessee	948	742	937	733	338	320	661	490
Alabama	2,705	2,079	2,694	2,058	290	251	1,631	1,081
Mississippi .. .	3,449	2,622	3,421	2,533	377	322	2,692	1,704
Arkansas .. .	2,816	2,165	2,782	2,125	328	304	1,904	1,349
Louisiana .. .	1,575	1,140	1,569	1,119	337	289	1,104	676
Oklahoma	2,471	1,733	2,372	1,656	156	163	773	563
Texas	12,769	9,163	12,539	8,784	197	168	5,154	3,086
New Mexico .. .	162	97	159	94	490	489	163	96
Arizona	299	203	299	203	501	462	313	196
California .. .	624	356	620	341	570	596	738	424
All other	31	21	30	20	361	379	23	16
UNITED STATES ..	34,090	25,018	33,623	24,248	269.9	235.8	18,946	11,943

U.S. COTTON CROP REPORTS, SEASON 1939-40

The United States Department of Agriculture will issue reports on the 1939-40 American cotton crop at the following times and dates :—

Date of Publication	Time	Subject of Report
Saturday, July 8	5 p.m.	.. Acreage.
Tuesday, August 8	5 p.m.	.. Production, condition, and yield.
Wednesday, August 23 ..	4 p.m.	.. Ginnings.
Friday, September 8	5 p.m.	.. Production, abandonment, area left for harvest, yield, and ginnings.
Saturday, September 23 ..	4 p.m.	.. Ginnings.
Monday, October 9	4 p.m.	.. Condition, production, and yield.
Wednesday, October 25 ..	3 p.m.	.. Ginnings.
Wednesday, November 8 ..	4 p.m.	.. Production, yield, and ginnings.
Tuesday, November 21 ..	3 p.m.	.. Ginnings.
Friday, December 8	4 p.m.	.. Estimated total production, revised acreage, yield, and ginnings.
Wednesday, December 20 ..	3 p.m.	.. Ginnings.
Tuesday, January 23	3 p.m.	.. Ginnings.
Wednesday, March 20	3 p.m.	.. Final ginnings.
About May 25	—	.. Revised estimate of 1939 crop.

The times shown up to and inclusive of September 23 are British Summer Time ; thereafter the times quoted are Greenwich Mean Time.

U.S. COTTON'S NEAR TERM OUTLOOK

(Reprinted from the "New York Journal of Commerce.")

The long term prospects for American cotton remain clouded because of the everchanging and often inept measures adopted by the Government to peg the price of a commodity, a large part of the output of which is exported abroad. For the near term, however, the outlook for this product is considerably improved, and a substantial increase in exports of the fibre looms ahead for the next few months.

The impression prevailed both here and abroad late last year and early in 1939 that the Government would seek to sell at lower prices part of its large stock of cotton accumulated by making loans to growers and that it would seek from Congress the power to reduce or eliminate Government loans on the 1939 crop. Secretary of Agriculture Wallace himself indicated last fall that a smaller loan would be necessary in 1939. Hence, the trade both here and abroad curtailed purchases of raw cotton as far as possible, and held down commitments to a minimum pending the final determination of the Government cotton control programme.

All the world now knows that the cotton programme has been reversed in one very essential respect, in that exports are going to be stimulated through a subsidy rather than by lowering the domestic price of the staple. Because the Government is not going to release any cotton at reduced prices, under the programme announced, the market price has gradually moved up so that now farmers are beginning to find it profitable to withdraw cotton from the Government loan and sell it in the market.

Now that the trade has been told that the loan on this year's crop will be about the same and perhaps even higher than last year's, there is no longer any incentive to refrain from buying raw cotton.

Once the subsidy arrangements have been disclosed, foreign spinners, whose holdings of American cotton have fallen to a minimum, will similarly have to buy vigorously to replenish their stocks. This will be so particularly since crops in other major producing countries will not be available to buyers abroad for several months.

The stronger market position of American cotton for the near future is reflected not only in statistics of available supplies outside the Government loan, but also in the fact that the size of the open interest in the cotton futures market has ended its long decline. Furthermore, the Commodity Exchange Administration reports that some 272,000 bales of cotton have been sold on call based on 1939 crop futures quotations. Such cotton has been bought not only by domestic mills, but also by foreign buyers where merchants have given assurances that they will pass on any subsidy that becomes available.

If the new crop is relatively small this year, therefore, the Government may be able to reduce its holdings considerably. However, under existing policies this will yield at best only temporary relief from the adverse effects of the cotton control programme as it has been pursued.

THE AMERICAN COTTON SUPPLY SITUATION AND PROPOSED EXPORT SUBSIDY

The New York Cotton Exchange Service recently commented upon the American cotton supply situation as follows:—

While it is much too early to foresee clearly the supply and demand situation on American cotton in the coming season, various recent developments have led the cotton trade to consider the possibility that the tight situation witnessed this season will extend into next season. Among such developments are the non-release of Government loan cotton except on the payment of loan principal and charges, the recent adverse development of the new domestic crop, revisions made by the Department of Agriculture in its acreage and yield per acre figures for last year, which revisions indicate that last year's crop was as large as it was only because of an exceptionally high yield per acre, and indications that the supply of foreign cottons next season may be somewhat smaller than the supply this season. Those developments have been superimposed on the realisation that the supply of American cotton in private trade channels at the end of this season—the "free" supply, so-called—will be much below normal both in the United States and abroad.

It seems evident that the Government is committed to the policy of refusing to release Government loan cotton except on the payment of the full amount represented by loan principal plus accumulated charges. The present farm law prescribes that policy, and only by changing the law can the policy be changed. On the approximately 4,300,000 bales of loan cotton of 1938 growth, loan principal plus charges to date total

about 8.70 to 8.90 cents a lb. on middling seven-eighths inch cotton. On the approximately 5,300,000 bales of loan cotton of 1937 growth, loan principal plus charges to date total about 10.25 to 10.45 cents a lb. on middling seven-eighths inch and better cotton. On the approximately 1,700,000 bales of loan cotton of 1934 growth, loan principal plus charges to date total roughly 15.75 to 16.00 cents a lb. The totals for loan principal plus charges increase by six to seven points each month, and so at the end of this calendar year they will be roughly 40 to 50 points higher than at present. It has been made evident during the past month that most growers who have cotton in the Government loan stocks will not repossess and sell their loan cotton—or sell their equities in it—for less than 30, 40 or 50 points net profit to them. This makes the price levels at which the trade can obtain loan cotton 30, 40 or 50 points above the levels stated.

The New York Cotton Service comments on the proposed export subsidy as follows :—

While there is some question as to how much money will be available to the Secretary of Agriculture for use on cotton export subsidy account—since it is believed in some quarters that the Secretary could use for this purpose a very large amount under a generally overlooked provision of the old Soil Conservation and Domestic Allotment Act passed in 1936—it is generally understood that the amount available to the Secretary is limited to approximately \$36,000,000. On this assumption it is generally expected that the subsidy rate will not be more than one cent a pound or five dollars a bale, since it is noted that at that rate a subsidy on exports of 6,000,000 bales would absorb \$30,000,000. Some portion of the assumed \$36,000,000 will have to be set aside for a compensating subsidy on exports of cotton goods, and some other portion will doubtless be absorbed by administrative expense. Hence, if it is a fact that the total fund which the Secretary of Agriculture can use on cotton export subsidy account is limited to \$36,000,000, possibly not over \$30,000,000 will be available for subsidy payments on exports of cotton.

While no information is available in official quarters as yet, it is believed that subsidy payments will not be made on old crop cotton ; that is, on cotton of 1938 growth exported during the balance of this season or in the first week or two of next season. It is expected that subsidy payments will be made only on new crop cotton until the exportable portion of the new crop has been moved abroad, and then they will be made on old crop loan cotton if there is a continuing foreign demand for American cotton at the low subsidised foreign price and if there is money still available for subsidy payments. The possibility of some old crop loan cotton, as well as the exportable portion of the new crop, being moved into export channels under the subsidy programme will depend partly on how large the new crop is, partly on how much cotton the domestic mills take during the coming season, and partly on the subsidy rate per pound. The size of the new crop and the takings by domestic mills during the season will, together, determine how much

cotton out of the new crop must be exported if the entire crop is to be distributed, and that, together with the subsidy rate, will determine whether all of the fund available for subsidy purposes will be absorbed in subsidising exports out of the new crop.

Mr. Oscar Johnston, National Cotton Council president, declared himself as being opposed to the export subsidy plan being applied to cotton because it will not work out satisfactorily.

Speaking before the annual convention of the Southern Newspaper Publishers' Association at Old Point Comfort, Va., Mr. Johnston explained the functions of the National Cotton Council and the policies which it stands for.

"Prospects for developing foreign markets for our agricultural products are indeed gloomy," Mr. Johnston said. "Present reports from Washington give us no cause to hope for any concerted effort, or action, on the part of the national congress to do anything more than attempt to apply additional uneconomic, stop-gap, temporary remedies.

"We erect special barriers to prevent the importation of commodities subsidised by foreign governments, yet at the same time we endeavour to increase exports of our own commodities through subsidisation. For the past year we have subsidised the export of wheat. While invoking the countervailing duty penalties to prevent the importation of merchandise from Germany, we have at the same time, at the expense of the American public, subsidised the export of wheat to that same country, Germany.

"It was reported that a serious effort would be made by our congress, with approval of the executive branch of government, to subsidise the export of raw cotton. Necessarily, if we are able to maintain for any appreciable period the export of cotton surpluses, we must sell cotton to Germany, Italy and Japan.

"Is it probable, or even conceivable, that under existing conditions the American public will stand for the expenditure of millions of dollars to subsidise exports to either of these countries? Even if they will, can we increase the dollar return to this country by subsidising the export?

"My personal position is that subsidising the export of cotton cannot, for any sustained period of years, materially increase our cotton exports, and that certainly it cannot increase the amount of money which will come into this country by reason of the export of subsidised cotton."

(Cotton Digest)

The monthly report of the National City Bank of New York for June contains the following commentary on the question of subsidising cotton exports:—

Unavoidable losses to the public result from subsidising exports for they demoralise all markets. Our unaided cotton exports, reduced as they are, have been bringing lower prices because of reports of probable dumping. Every rumour of Washington policies disturbs world markets, not only for cotton but for cotton goods. The practice of dumping (selling abroad for less than at home) is disruptive of legitimate trade,

unneighbourly and completely discredited. Each nation should do its share in the maintenance of orderly trade. The United States does not tolerate dumping by others, and many countries have laws against it. Senator Smith of South Carolina, Chairman of the Senate Committee on Agriculture, is quoted as commenting upon the dumping proposal that it would be a "violation of our own anti-dumping laws."

The opposition of the entire cotton textile industry to an export subsidy for raw cotton was reiterated by Dr. Claudius T. Murchison, president of the Cotton Textile Institute, who on June 15, replied to the address delivered recently before cotton growers at Little Rock, Ark., by Secretary of Agriculture Wallace.

Dr. Murchison took pains to reply to the charge of bad faith levelled at millmen by Secretary Wallace and asserted that the Secretary had reversed his position, reminding him that last September he publicly denounced the use of an export subsidy for raw cotton.

THE COTTON SUBSIDY

The official and semi-official statements which have emanated from Washington during the recent weeks in regard to the probable action of the U.S. Government in connection with a subsidy for exports of cotton and financial help for the cotton planter, has done much towards the dislocation of the cotton markets of the world and left traders in an attitude of bewilderment. The result has been that prices have fluctuated very irregularly and price differences between New York and Liverpool have been very erratic.

Early in June the impression was created that nothing would be done in regard to a cotton export subsidy until the International Conference of cotton growing countries convened for September 5 in Washington, but Mr. Wallace gave the optimists a shock on June 8, when he declared at a Press conference that it would be put into operation before that date. In the meantime, the proposed Appropriations Bill had been sent back to the House, as the Senate and House Committee considering, it failed to agree. Nevertheless, a compromise was arrived at under which the subsidy was to apply only to the 1939-40 and future crops, but not to earlier crops. The members of the Senate and House Committee then readjusted their differences and recommended provisions for the proposed parity payments and at the same time a sum of \$14,000,000 was set aside for the disposal of surplus crops which is assumed by the trade to include the cotton export subsidy. Incidentally, \$22,000,000 of the customs revenue has been set aside for the same purpose, totalling in all \$36,000,000 which, at the maximum subsidy of 2 cents per lb., could be applied to 3,500,000 bales. This compromise was eventually accepted by the House of Representatives, and the Bill was signed by the President on June 30. The Bill does not, however, state when the subsidy comes into force nor does it state the value of the subsidy per lb. These items,

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it is understood, are to be decided at the discretion of the Department of Agriculture.

We give below a chronology of cotton news from Washington, extracted from Pearsall's *Market Bulletin* :—

May 26.—Wallace Little Rock Speech. Secretary Wallace outlines five-point cotton programme : (1) Continuation of loan ; (2) Continuation of benefit payments , (3) Expansion of domestic consumption ; (4) Maintenance of our fair share of world market—temporarily through an export subsidy programme and more permanently through international cotton agreement ; (5) A processing tax or its equivalent.

May 31.—International Conference Called. State Department, at request of Secretary of Agriculture, has called representatives of ten foreign cotton producing countries to an exploratory conference at Washington September 5 to discuss possibility of world cotton agreement.

June 1.—Hint at Subsidy Delay. Washington advices indicate export subsidy may be delayed until after September international meeting.

June 8.—No Subsidy Delay. Secretary Wallace, in press conference, says cotton export subsidy will be put into operation before September 5 convening of international conference, stating : " If we are going to have a successful international cotton conference, it is obvious that our cotton must be made competitive with other growths on an equitable basis."

Conference Committee debates a proposal by Senator Smith to write a definite ban against cotton export subsidy programme in agricultural Appropriations Bill.

June 9.—Wallace Replies to Manchester Spinners. Answering request of Spinners' Federation to release cotton, Secretary Wallace replies : Administration action will be determined by Congressional action.

June 12.—Subsidy Faces House Test. Senate House conferees refer question of \$113,000,000 appropriation for crop surplus removal, including cotton export subsidy, back to House.

June 15.—Wallace on Cotton Policies. Secretary Wallace at press conference says : While cotton trade disagrees as to methods of accomplishment, it agrees on (1) world price should be competitive ; (2) loan stocks should be reduced ; (3) distant futures should be more nearly in line with nearbys ; (4) growths, staples and classes more readily available at home and abroad ; (5) increased home and foreign consumption.

June 21.—Compromise Subsidy Plan. Joint Senate House Conference Committee agree that 50 per cent. of funds from \$113,000,000 for surplus removal be used domestically, pointing to \$14,000,000 available from this fund for cotton export subsidy plus \$22,500,000 from customs receipts.

June 22.—Say Subsidy Assured. Agriculture Department officials assert that cotton export subsidy would be instituted even if House rejects \$113,000,000 appropriation.

House Accepts Compromise. House, by vote of 145 to 100, accepts \$113,000,000 item for crop surplus removal with provision that 50 per cent. of funds for cotton be used domestically. Bill returns to conference for settlement of other differences.

SUBSIDY OF ONE-AND-A-HALF CENTS

Since the previous articles were written, Mr. H. A. Wallace, Secretary of the U.S. Department of Agriculture, announced on July 22 that an export subsidy on cotton of $1\frac{1}{2}$ cents per pound would be introduced by the United States Government on July 27. Furthermore, there will also be a subsidy upon cotton goods of $1\frac{1}{16}$ cents per pound.

Because of the difficulty of preventing the re-entry of subsidised exports, the subsidies will not apply for the present to goods for Canada, Mexico, British Honduras, Colombia, Costa Rica, Cuba, Dominica, Guatemala, Haiti, Honduras, Newfoundland, Nicaragua, Panama, Salvador, Venezuela, or any other place north of latitude 10 deg. North and between longitude 40 and 120 West.

Early in June there were strong indications that the subsidy would not be applied to this season's crop. Since then, however, the plan has made unexpected progress and cotton exporters from India, Egypt and South America have had to meet, in effect, the subsidy prematurely, because market prices had already discounted the effect of the subsidy to some extent. To the cotton market in the United States the subsidy is a bullish factor as it will probably lead to a considerable reduction of large stocks of American cotton accumulated in that country by the American Government.

As regards the markets outside the United States, the effect of the subsidy is doubtful because the markets had discounted the news of the subsidy before the same had been put into effect, furthermore it had been rumoured that a subsidy of 2 cents would be applied instead of $1\frac{1}{2}$ cents per pound as has now been announced.

BRAZILIAN COTTON TO U.S.A.

Some 25,000 bales of Brazilian cotton have been exported to U.S.A., and are in process of manufacture. The cotton this year is, in some lots, well up to $1\frac{1}{8}$ in. in length, and compares favourably with American cotton in grade and character. It averages $\frac{1}{2}$ cent less in price for same types as domestic staple. Some mills which have run tests on Brazilian cotton, like it; some classers say it is nice silky fibre. Considerable amounts are coming in for use in New England, in some few southern mills, and in some Canadian plants.

It is pointed out that the Brazilian cotton today is not Brazilian cotton of a few years ago; that a million dollars or more has been invested by a large American cotton company in erecting modern gins and making trading arrangements in Sao Paulo; and that this is the logical year for that company to begin international selling operations in Brazilian cotton.

(Textile World)

THE PROPOSED EXPORT SUBSIDY —A SOUTH AMERICAN VIEW

The cotton export subsidy plan now under consideration in the United States Senate will, if put into execution, result in chaotic conditions in the world cotton trade, virtually constituting a world price war, is the opinion of M. Montero-Bernales, Peruvian cotton merchant, who is in the United States studying the cotton situation.

Mr. Montero is President of the Lima, Peru, firm bearing his name, the largest cotton brokerage house in Peru. He is a member of the governing board of the Agricultural Bank of Peru, a semi-governmental institution which finances all branches of agriculture in Peru. He is well known throughout the cotton trade in this country, Europe, and the Orient, as well as in South America, as an outstanding authority on Peruvian cotton.

In discussing the cotton export subsidy plan, Mr. Montero vigorously protested against it as being most inconsistent with the strongly advocated good neighbour policy between the various American countries. He predicted that if the plan should be put into execution it would be most difficult to explain it to more than one South American country in the face of that policy. Pointing to the severe price declines that have already taken place in foreign cotton markets on the mere proposal of the subsidy plan, he expressed the conviction that the plan would seriously damage the national economy of Peru and other cotton growing countries.

Mr. Montero continued : " With high tariff walls the United States restricts its purchases from South American countries to only a few products which, in all events, it cannot acquire at all or to better advantage in other parts of the world. Hence, South America has had to find markets for most of its products in European and Oriental countries. These countries naturally press for a large share of South American imports in turn. South American nations, however, are buying great quantities of manufactured goods from the United States—in some instances, irrespective of what the United States buys from them. The South American market for manufactured goods of the United States is thus increasing in importance from year to year.

" South American countries show in this manner how favourably disposed they are towards the United States. They realise, to a certain extent, that U.S.A. with its enormous natural resources, cannot welcome competition with its domestically produced goods from other nations. They hope, nevertheless, that gradually the United States will move in the direction of a policy which will recognise the fact that commerce is a two-way street. They have been encouraged in this hope by the efforts which are being made to formulate commercial treaties between the various South American countries and the United States to their mutual advantage. While this principle of closer commercial co-operation and goodwill is thus in process of development, the least South America could expect is, needless to say, that the United States would refrain from

adopting policies which would disrupt foreign markets for South American products, particularly policies which have been strongly condemned by the American Administration when practised by other countries in dealings with South America and with the United States itself.

"In view of these facts, it is most surprising, as well as most disturbing, to find that the United States proposes, by a government subsidy on cotton, to pursue a programme which would greatly reduce prices of South American cotton, most likely keep prices of South American cotton at a low level for years, and, to no small degree, tend to eliminate South American cotton from world markets." *(Cotton Digest)*

NET WEIGHT BILL PASSED

The Fulmer Net Weight Cotton Bill, designed to promote the use of that commodity through the fixing of a standard for bagging for cotton shipped in interstate commerce, was recently passed by the U.S. House of Representation on a voice vote.

The Bill would provide that no bagging for covering baled cotton may exceed 14 ozs. per square yard and although it does not prohibit use of any material for bale covering which would meet requirements of United States tare standards, it would tend to replace jute coverings now in use in U.S.A. with cotton bagging.

During debate on the floor of the House, Representative Hampton P. Fulmer (Dem. S.C.), author of the measure, estimated that passage of the Bill would result in the use of an additional 200,000 bales of cotton per year.

Mr. Fulmer stated that the use of the 14-oz. covering would require only 15 lbs. of bagging and ties per bale, compared with the 21 lbs. necessary when the present weight jute is used.

This, he estimated, would result in a saving to the cotton farmer of \$6,000,000 annually. He estimated a further saving of \$6,000,000 to \$10,000,000 in insurance and waste.

"There is anywhere from \$12,000,000 to \$20,000,000 annually coming out of the price that the cotton farmer should receive in extra freight, insurance and waste," he asserted.

He further stated that the Bill has been approved by manufacturers and foreign cotton buyers and has been endorsed by the cotton industry, cotton co-ops., the Cotton Council, and farm organisations, and that enactment of the measure has been recommended by the Department of Agriculture.

(New York Journal of Commerce)

A Bill sponsored by Senator Bilbo providing for net weight trading in cotton was recently before a U.S. Senate agricultural sub-committee.

Various cotton and jute interests have expressed approval of the Net Weight Bill on condition that it is amended to allow for "standardisation of tare." This was understood to mean that any material would be permissible for use as cotton bagging, but each material would have to be uniform as to weight, strength and certain other qualifications which would be named by the U.S. Department of Agriculture.

The Agricultural Commissioner's brief states that if the Bill is passed the following benefits will result :—

(1) Eliminate the wasteful practice of adding unnecessary weight to cotton bales in order to equal tare allowances.

(2) Simplify trading and reduce risk by removing the uncertainties which now exist relative to the weight of the coverings on a bale of cotton.

(3) Reduce costs of transportation, insurance and other items incident to the handling and shipment of cotton.

(4) Remove a major obstruction to the use of cotton and other light weight bagging and patches which now are effectively excluded under the gross weight system of selling.

(5) Promote the use of satisfactory materials for covering bales, thereby increasing the protection afforded the cotton, improving the appearance of the American bale, and strengthening the competitive position of American cotton in world markets.

The Net Weight Bill if reported favourably by the sub-committee, will then go to the Senate Agriculture Committee for approval and later to the Senate for a vote.

FACTORS AFFECTING AMERICAN COTTON YIELD PER ACRE

In response to a query as to why the yield per acre of American cotton had shown such a heavy increase during recent years, the American Cotton Crop Service of Madison, Florida, have made the following reply :—

(1) For the first time in the history of U.S. cotton production accurate figures on acreage planted are available from aerial photographic maps. In the past acreage figures were purely guesswork.

(2) Most of the thin, worn out or depleted soils have been classed as submarginal lands and devoted to soil-building crops or forestry.

(3) In addition to planting the more fertile soils, the Government Rural Resettlement Organisation loans farmers who cannot get credit from any other source, ample funds for the purchase of work-stock, implements and fertilizer. With good work-stock and ample fertiliser this class of farmers have exerted a powerful influence on increased yield per acre.

(4) Increased use of tractors for both land breaking and cultivation has given the land much better preparation than it formerly received and the crop is now much better cultivated.

(5) Cotton varieties have been improved and are early in maturity, thus offsetting weevil damage.

(6) There has been a decided change in methods of fertilisation in recent years. Instead of putting all the fertiliser out before or at planting time, cotton growers now use many applications of side or top dressings. They have learned that it is more profitable to feed the plant food as it is needed compared with the old method of putting out all the fertiliser at one time and having a large percentage lost by leaching from heavy rainfall.

U.S. STANDARD COTTON BAGGING

A communication received recently by the Federation from the Lane Cotton Mills Co., of New Orleans, states that the U.S. Congress is now considering the passage of a Net Weight Bill for cotton. There will be over one million bales of cotton covered with 3 to 4 lbs. U.S. Standard Cotton Bagging this year. The passage of the Net Weight Bill by Congress is the only thing now required for the success of the exclusive use of cotton bagging for covering cotton.

The Lane Cotton Mills are also advocating the use of cotton rope in place of steel ties for tying bales, and it is believed that about 30,000 bales of cotton will be tied with cotton rope this season. Steel ties (bands) are the cause of many fires in mills and furthermore, the rust of the steel ties often damages the cotton. Many accidents are also occasioned through the use of these ties to cotton mill operatives.

The above-mentioned mills are also making cotton twine for sewing the ends of cotton bales in place of sisal twine which has been principally used heretofore.

It is confidently expected that this cotton twine will be generally adopted in U.S.A., and if a bale of cotton wrapped in cotton bagging, tied with cotton rope and sewn with cotton twine is procurable, the risk of objectionable foreign fibres in mills will be minimised and waste which is inherent when bagging other than cotton bagging is used, will thus be reduced.

PINK BOLL WORM

The House of Representatives in June voted the sum of \$906,800 for the eradication of the pink boll worm which is a more dangerous pest to cotton than the boll weevil. The pest has been found in several counties of South and Central Texas during recent years spreading into the American cotton belt from Mexico in spite of quarantine stations situated on all roads and railways leading out of the infested districts.

The serious developments which only became evident last fall, with respect to the extension of infestation in South Texas, have only become apparent comparatively recently. Even those who are well informed regarding current affairs generally, and especially the people of the cotton belt as a whole, are unaware of the immediate emergency existing in the major threat to all the cotton states by the most dangerous of all the pests attacking cotton.

It is realised that the pink boll worm is a direct threat in the potentiality of the elimination of profitable production of cotton in all of the cotton states. This would inevitably bring about readjustments on the farms of the cotton belt that would adversely affect the welfare of the corn, hog, wheat, dairy, livestock and other interests of other sections.

THE TEXAS INSECT SITUATION

The American Cotton Crop Service comments as follows anent the insect situation in Texas :—

According to Prof. F. L. Thomas, State Entomologist of Texas, cotton insect activity has continued to increase. We quote his latest report as follows : “ Flea hoppers continue to do some damage in fields near Robstown, Corpus Christi, Odem, and Gregory in Nueces and San Patricio Counties ; they are increasing in Calhoun County and are beginning to appear in injurious numbers in fields near Coupland and Taylor in Williamson County.

Boll weevils are already causing serious damage in most fields that are in close proximity to woodlands. The highest infestation found, where 31 to 50 per cent. of the squares were punctured, was in fields of Bastrop, Brazos and Colorado Counties.

Present indications point to the prospect of increasing flea hopper injury in cotton on the heavier soils and severe boll weevil damage in upland fields near wooded sections. The average weevil infestation is low in the large open bottomland fields of Burleson County.

Leaf worms have not been found in large numbers in South Texas as yet, although the second generation should now be present in the field.”

SEA ISLAND PROSPECT.

The Sea Island cotton prospect is much better than for the same time last year. Early planted fields in North Florida now have as many as ten small bolls per plant. In spite of acreage reduction of Sea Island cotton in favour of bright tobacco, present prospects point to a crop in Florida larger than produced last year. Weather conditions have been mostly unfavourable for early season poisoning, but growers have applied poison between showers and, where the poison programme has been properly carried out, infestation is less than one per cent.

ROLLER VERSUS SAW GINNING IN FLORIDA

The American Cotton Crop Service of Madison, Florida, believes that great benefit will come from the WPA Experiment in roller ginning long staple upland cottons in Florida during the current season. As a matter of fact, the processing of cotton has received little attention from American growers and ginners. In the case of ginners, the more bales ginned per day the more profit they make. This practice, in our opinion, must be corrected and it is hoped that the roller ginning of both Sea Island and long staple upland (one and one-half inch staple) will awaken growers of fine, long staple cottons to the importance of roller ginning. When combed, roller-ginned cotton gives from 10 to 15% waste compared with 25 to 35% where ginned on saw gins. Therefore, we believe the roller ginning experiment in Florida will prove as important as insect control and other features now being stressed by the leaders of our cotton industry.

(American Cotton Service)

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Representative to be appointed.

*The Minister of Agriculture of Egypt and the President of the International Cotton Federation
 are ex-officio members.*

General Secretary : N. S. PEARSE.

Expert Adviser : ARNO S. PEARSE.

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EGYPTIAN COTTON

OFFICIAL ACREAGE REPORTS

The first official estimate of Egypt's cotton plantings this season was appreciably smaller than most traders had expected. The area in cultivation is given as 1,624,817 feddans, which compares with 1,783,911 feddans in 1938, and with 1,978,151 feddans in 1937. This year's area accordingly is the smallest since 1927-8, when only some 1,516,000 feddans were cultivated as a result of the fact that in the previous season the United States had for the first time produced a crop of over 17,000,000 bales. The plantings this year and in 1938 and 1937 are shown in the following table :—

			1939	1938	1937
			Feddans	Feddans	Feddans
Lower Egypt	..	..	1,096,206	1,209,396	1,266,440
Middle Egypt	..	..	341,922	356,448	408,447
Upper Egypt	..	..	186,689	218,067	303,264
Total	..	..	1,624,817	1,783,911	1,978,151

No details of the area planted to the different varieties will be available until early next month, but a few days ago the Bourse de Minet-el-Bassal reported that plantings in Upper Egypt and Fayoum were about 5 to 10 per cent. less than last year and that in Lower Egypt Giza 12 had increased considerably at the expense of other varieties except Giza 7, which showed a slight increase over 1938.

EGYPT AND THE WORLD COTTON PRODUCTION CONFERENCE

The following is a translation of an article which recently appeared in the Egyptian newspaper *L'Informateur* :—

Now that the principle of the necessity for a more general agreement between the different cotton producing countries has been recognised

and the United States has taken the initiative in convening a conference for next October, we believe that some purpose would be served by stating our views upon what should be borne in mind by the Egyptian delegates to this conference.

AMERICAN AND EGYPTIAN COTTONS DO NOT COME DIRECTLY INTO CONFLICT IN THE MAIN CONSUMING CENTRES OF THE WORLD.

Egypt is perhaps the only producing country whose cotton does not, in the main, come into direct competition with the American product destined for export, for the following reasons :—

(1) The short staple cottons produced in Egypt, which could be utilised by the industry for eventually replacing American varieties of 1 in. and below, are negligible.

(2) In the United States there is scarcely any exportable surplus of long staple cotton which would come into competition with the Egyptian varieties in the mill of the spinner equipped to use these varieties. Since the United States imposed an import tax of 7 cents. per lb. on imported long staple cotton, their exports of cottons in this category have suffered tremendously.

COTTONS WHICH COME INTO DIRECT CONTACT WITH EGYPTIAN COTTON IN FOREIGN MARKETS.

Cottons with which Egyptian cotton directly competes are in the main long-stapled Peruvian, Anglo-Egyptian Sudan, Uganda and a few other growths produced elsewhere in small quantities. The total produced by the whole of these competing countries, is however, less than one half of the average yearly production of Egypt, without taking into account American long staple, which, as has already been pointed out, is almost entirely used for local consumption in U.S.A.

Under these circumstances and granting that even in cases where length of staple is equal, Egyptian cotton is rather superior to exotic cotton, it is the Egyptian market which acts as principal controller of the cotton of this category ; or rather to which this role should revert, when compared with the U.S. market which is for all practical purposes the main controller of prices for all other cottons with a staple length about equal to the cottons actually exported from the United States.

Unfortunately, in this matter of the world price control for the longer staples, the Egyptian market cannot exercise control as well as the U.S. market, for Egypt depends almost entirely upon the consuming markets, whose views must of necessity carry great weight with the Egyptians, as Egypt herself only consumes about 6 per cent. of her cotton production. As the United States consumes more than 50 per cent. of its own production, it is better able to defend its prices, being able to temporise by domestic purchases, while offers are being made for the rest of the crop, and to take a firm stand against any undue exploitation of these offers by the countries whose sole interest is to buy at the lowest possible prices.

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Egypt, consuming as she does only a bare 6 per cent. of her crop, thus finds herself completely at the mercy of foreign consumers.

HAS EGYPT EXPLOITED THE COTTON POLICY OF THE UNITED STATES IN ORDER TO INTENSIFY HER OWN PRODUCTION TO THE STATES' DETRIMENT ?

This question will doubtless be raised at the forthcoming Conference. If such is the case, Egypt should reply unhesitatingly that it would be false to cast the slightest aspersion at her on this score. She can positively affirm that if, as a result of the lack of any expressed agreement with the United States, she has not ostensibly adopted measures designed to reduce her cotton acreage, she has nevertheless adopted an indirect and very effective measure equivalent to that embraced by the United States. For, in order to obviate a large extension in cotton acreage, she has imposed prohibitive import duties on foreign flour and cereals which encourages cultivators to devote more attention to the greatest possible development of the cultivation of cereals to the detriment of cotton, always having in mind of course the question of crop distribution. It is for this reason that the acreage under cotton, which some years ago stood at 2,100,000 feddans, figures at the moment at 1,700,000 to 1,800,000 feddans. Without the indirect measure adopted by Egypt to restrict the cultivation of cotton and taking into account the low world prices for cereals and the new cotton growing regions recently opened up in various parts of the world, the acreage under cotton in Egypt would probably have reached 2,500,000 feddans yielding a crop 30 to 40 per cent. greater than that of today.

It can perhaps be argued that in spite of the reduced acreage, the yield of the Egyptian crop is still slightly superior to those yields of a few years ago. The increase in the average yield per feddan, which in any case is not proportionately greater than the increase in the average yield in the United States, would doubtless be due in both cases to the necessity which compels the cultivator to intensify and to improve his methods of cultivation in order to reimburse himself in part for the fall in the price of his product. But no reproaches on this account can reasonably be directed either at the Egyptian cultivator or his American vis-a-vis.

WHAT SHOULD BE THE EGYPTIAN ATTITUDE AT THIS CONFERENCE ?

For reasons previously stated, the question of reduction in acreage should be ignored. Egypt having already taken the necessary steps to limit her acreage, she cannot consent to any further reduction without upsetting the equilibrium of her financial and economic stability. The fact that the average figure for world consumption of Egyptian cotton has risen until it is almost equal to the average annual production figure is an indication that there is no over-production of Egyptian varieties which justifies a reduction in acreage and that the fall in prices is due to other causes, upon which more attention should be focussed.

Neither can Egypt limit her exports to a given figure, for resulting accumulation of stocks would create lower prices in the future than those against which agitation is now being directed.

Apart from these two points, Egypt should not refuse to participate in any equitable and rational measure which would have for its object the improvement in prices desired by all, by even going so far as to promise not to modify the regulations now in force which limit automatically the cotton acreage by encouraging the increase in the cultivation of cereals.

If the placing on the market of Egyptian cottons should have an unfavourable effect upon world trade in cotton it is not on account of the hundred or hundred and fifty thousand bales more or less which Egypt would put at the disposal of foreign consumers, but on account of the average price which she would accept for the sale of the whole of her production. If this price (having regard to the length of staple and superior quality of Egyptian cotton) is too low, the almost inevitable repercussion of this low price on the whole of the cotton markets could only be regarded as detrimental in the extreme.

The United States would have a special interest in helping Egypt to maintain the price of her cotton at a level equal to its intrinsic value, firstly because they themselves produce a fairly large quantity of similar cotton, as they are, after Egypt, the largest producers of long staple cotton, and secondly because a rise in the price of Egyptian cotton would reflect upon the whole of their crop and upon the difference between their middling quality and qualities superior to middling.

A LIMITED AGREEMENT IN CASE OF NEED BETWEEN EGYPT AND THE UNITED STATES.

If the Conference should fail to bring about any concrete results, as is very much feared, having regard to the great diversity of interests, a limited agreement between Egypt and the United States would always be possible and should be advantageous to both parties. The agreement would, in the main, embody the maintenance of the price of Egyptian cotton at a level consistent with its intrinsic value in order to avoid the repercussion of low prices on the whole of the American types.

The United States hold in their hand all the necessary cards for aiding Egypt to maintain the price of her cotton without occasioning any inconvenience to themselves. It would suffice for them to abolish the import duty of 7 cents per lb. Their producers of long staple cotton would lose nothing because the rise in the price of Egyptian cotton which would follow would compensate them for the artificial advantage they now enjoy, whilst the cotton producers as a whole would profit from the elimination of a serious bear factor such as the undue depreciation of Egyptian varieties undoubtedly is.

The serious depreciation in price of Egyptian cotton dates from the imposition of the 7 cent. duty in U.S.A. It has cost Egypt millions of pounds without enriching America in any way. If the duty were to be abolished and certain other practical steps taken at the same time to liberate the Egyptian market from its almost entire dependance upon foreign consumers, the situation could be improved to the mutual advantage of both the United States and Egypt.

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EGYPT AND THE WORLD CONFERENCE

The *Egyptian Gazette*, usually well informed on cotton matters, published the following leader under date June 30 last :—

It is hard to recall a time when the outlook for cotton has been wrapped in mystery for so long as now. Even the experts have given up trying to anticipate events. The United States, of course, holds the key to the situation, but just how they propose to use it no one can say with any certainty. The numerous proposals and counter-proposals of cotton interests in Congress have made the situation still more confused, and it is quite likely that nothing very definite will emerge before the summer recess. Meanwhile, other cotton-producing countries are showing increasing interest in the proposed World Cotton Marketing Conference in Washington in the autumn, in the belief that it may prevent the United States from taking some drastic step which would knock the bottom out of the market. Mr. R. A. Butler, British Under Secretary of State for Foreign Affairs, stated in the House of Commons in reply to a question on this subject that the British and Indian Governments, together with the Sudan, had indicated their willingness to participate provided that the other major producing countries were represented. Egypt, we understand, takes a similar view, and it seems likely that in the event of the conference materialising it would be fully representative of the cotton world. But it is one thing to get all countries represented and another, in view of their different interests, to reach an agreement satisfactory to them all. And it will be just as difficult to obtain unanimity in the various countries concerned before the delegates ever reach the conference.

This is particularly the case in Egypt. Agricultural opinion is strongly opposed to any limitation of acreage, on the grounds that past experience has shown that it brings no benefit to the country. It is argued that Egyptian long-staple cotton still enjoys a privileged position in the markets of the world and that no difficulty is found in disposing of a normal crop. If, therefore, Egypt consented to limitation it would merely mean so much less income. And there is much to be said in favour of this line of argument. The 1937-38 crop was a record and there was an unusually large carry-over. But nature, as so often happens, contrived to play a part last season (although the final figures have shown that it was not so decisive a part as was at first anticipated) and there was a return to the more normal figure of eight million kantars. Already nearly seven and a quarter million kantars have been exported and the season has still two more months to run, so that it seems likely that not only will the entire crop be exported but also a part of the old stock, leaving a smaller carry-over. And this has been achieved at a time of difficult trading. Another argument against restriction is that it offers little prospect of improved prices and would only result in curtailing income. Also, in the past, such restriction has worked in favour of other countries producing long-

staple cotton like Peru and Brazil, although it is difficult to see how this would be the case if the scheme was universally applied.

On the other hand, if Egypt seeks to be excluded from limitation there can be no logical reason why Peru, Brazil or any other country should not demand the same exemption. Moreover, it is hard to justify Egyptian agriculture's opposition to compulsory limitation of acreage when natural factors are already working in that direction. It has been unofficially estimated, for instance, that the area at present under cotton is some 15 to 20 per cent. smaller than last year. This may be an overstatement of the decrease, but it is safe to assume that the present unattractive prices for cotton have induced many farmers to seek alternative crops. Such being the case it seems unwise to prejudice the possibility of agreement by protesting too strongly against compulsory limitation. At the same time it would be unfortunate if America should try to force other countries into agreement under threat of subsidising exports. Such a policy would, if put into practice, demoralise the cotton market. Every country would of necessity have to follow suit, although the United States, with its greater financial resources, would inevitably triumph. In the meantime, however, cotton would be sold at an uneconomic level at the expense of tax payers. Such a development is not a pleasant prospect, and given an accommodating spirit at the conference, should never arise. The only solution for the American cotton surplus problem seems to be that the loan cotton will have to be marketed over a long period of years and this may be possible, providing there is some limitation of acreage. It seems hard that Egypt should have to suffer for another country's policy in storing such a large quantity of cotton, but America still rules the cotton world.

(*Egyptian Gazette*)

WATER TRANSPORT FOR COTTON ARRIVING IN ALEXANDRIA FROM THE INTERIOR

It is reported in the *Egyptian Mail* an agreement has been reached between the Egyptian State Railway Administration and the water transport companies, according to the terms of which the latter will transport seventy-five per cent. of the cotton crop. This agreement will come into force in the forthcoming season, and should the amount of cotton carried by the water transport companies exceed the allotted quota, they will pay an indemnity to the Railway Administration. It must be pointed out, however, that this agreement only concerns the transport of raw cotton from the interior. In consequence of the agreement it is expected that there may be a reduction in the freight rates charged by the water transport companies.

The *Association Cotonnière Coloniale* states that Dr. J. Templeton, who has spent a large number of years in Egypt as cotton botanist, has been engaged by the Portuguese Government to undertake similar work in Portuguese Angola.

CAMPAIGN AGAINST COTTON WORM

After the criticism that followed last year's heavy loss from cotton worm and other pests, elaborate precautions are being taken for this year's crop.

There is close co-operation between the Ministries of Agriculture and Interior both of which have delegated a much larger number of officials than in previous years to the Provinces where they are under the direct control of the Mudirs.

Mahmud Azmy Bey, Secretary General of the Ministry of the Interior, has recently returned to Cairo from an inspection tour in Caliubia and Sharkia Provinces and has informed the Minister of the Interior that the campaign against the cotton worm is proceeding in a very satisfactory manner.

It is learnt that so far the attacks have been mild and are not to be compared with last year, although it is feared that the recent cool spell may have been in favour of the pest and it will not be possible to appreciate the full effects of the campaign for some little time. But in view of the measures now being taken it is not thought likely to be severe.

(*Egyptian Gazette*)

GINNINGS TO MAY 15

According to the official figures of the Ministry of Agriculture the amount of cotton ginned up to May 15, *i.e.* practically the whole crop, is as follows :—

<i>Varieties</i>							<i>Cantars</i>
Ashmouni and Zagora	..	..	..	..	..	..	5,233,750
Giza 7	..	..	..	..	..	..	1,953,582
Maarad	..	..	..	..	..	..	395,098
Sakellaridis	..	..	..	..	..	..	293,198
Giza 12	..	..	..	..	..	..	178,660
Sakha 4	..	..	..	..	..	..	46,247
Fouadi	..	..	..	..	..	..	31,585
Giza 26	21,994
Giza 3	8,559
Non-classified	3,630
							<hr/>
Scarto	8,166,303
							174,250
							<hr/>
Total	8,340,553
							<hr/>

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FINAL ESTIMATE OF THE COTTON CROP OF INDIA

Provinces and States	1938-39 (Provisional Estimates)		1937-38 (Final figures)*		1936-37 (Final figures)*	
	Area (1,000 acres)	Yield (1,000 bales)	Area (1,000 acres)	Yield (1,000 bales)	Area (1,000 acres)	Yield (1,000 bales)
Bombay (a)	5,751	1,104	6,172	1,213	5,991	1,120
Central Provinces and Berar	3,742	549	4,047	698	3,952	851
Punjab (a)	3,652	1,398	3,986	1,513	3,691	1,921
Madras (a)	1,958	389	2,572	505	2,512	497
United Provinces (a)	667	181	595	200	700	175
Sind (a)	954	370	1,049	451	989	521
Bengal (a)	88	28	88	27	94	28
Bihar	43	7	43	8	31	6
Assam	36	14	45	24	36	13
Ajmer-Merwara	27	8	37	15	34	12
North-West Frontier Province	22	5	22	4	21	4
Orissa	8	1	8	1	8	1
Delhi	2	(b)	2	1	2	1
Hyderabad	3,490	507	3,563	570	3,080	499
Central India	1,141	159	1,323	142	1,414	203
Baroda	863	202	914	219	871	191
Gwalior	560	96	668	78	714	106
Rajputana	465	91	527	99	534	73
Mysore	84	11	85	11	85	12
Total	23,553	5,120	25,746	5,779	24,759	6,234

NOTE.—A bale contains 400 lbs. of cleaned cotton.

* These are revised estimates as finally adjusted by provincial authorities.

(a) Including Indian States.

(b) About 500 bales.

The detailed figures by Provinces and States are given in the appended table, and those according to the recognised trade descriptions are shown in the following statement :—

Descriptions of Cotton	TRADE DESCRIPTIONS					
	Acres		Bales of 400 lbs.		Yield per	
	(thousands)		each (thousands)		acre (lbs.)	
	1938-39	1937-38	1938-39	1937-38	1938-39	1937-38
Oomras—						
Khandesh	1,261	1,328	281	323	89	97
Central India	1,701	1,991	255	220	60	44
Barsi and Nagar	2,207	2,338	344	399	62	68
Hyderabad-Gaorani	925	959	129	142	56	59
Berar	2,644	2,865	406	430	61	60
Central Provinces	1,098	1,182	143	268	52	91
<i>Total</i>	<u>9,836</u>	<u>10,663</u>	<u>1,558</u>	<u>1,782</u>	<u>63</u>	<u>67</u>
Dholleras	<u>2,254</u>	<u>2,506</u>	<u>344</u>	<u>508</u>	<u>61</u>	<u>81</u>
Bengal-Sind—						
United Provinces	667	595	181	200	109	134
Rajputana	492	564	99	114	80	81
Sind-Punjab	2,186	2,640	742	1,018	136	154
Others	57	57	10	11	70	77
<i>Total</i>	<u>3,402</u>	<u>3,856</u>	<u>1,032</u>	<u>1,343</u>	<u>121</u>	<u>139</u>
American—						
Punjab	1,790	1,777	780	692	174	156
Sind	654	642	251	259	154	161
<i>Total</i>	<u>2,444</u>	<u>2,419</u>	<u>1,031</u>	<u>951</u>	<u>169</u>	<u>157</u>
Broach	<u>1,419</u>	<u>1,488</u>	<u>399</u>	<u>381</u>	<u>112</u>	<u>102</u>
Coompta-Dharwars	1,243	1,331	194	159	62	48
Westerns and Northern	1,752	1,814	238	176	54	39
Cocanadas	134	148	21	24	63	65
Tinnevellies	513	622	132	151	103	97
Salems	86	196	10	37	47	76
Cambodias	343	567	119	216	139	152
Comillas and other sorts	127	136	42	51	132	150
<i>Grand Total</i>	<u>23,553</u>	<u>25,746</u>	<u>5,120</u>	<u>5,779</u>	<u>87</u>	<u>90</u>

The area sown with cotton in Burma is reported to be 449,000 acres, as against 563,000 acres last year. The yield is estimated at 105,000 bales of 400 lbs. each, as compared with 150,000 bales last year. The quantity likely to be exported from the present crop is estimated at 99,000 bales.

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SPINNING TESTS ON INDIAN COTTONS

A number of spinning test reports on samples of regular Indian cottons has been received at the offices of the International Cotton Federation. The cottons tested include the following, all of the 1938-39 crop :—

Sind Sudhar	Jagodia
L.S.S.	Cambodia Co. 2 (440)
Surat 1027	Sind Suahar (289 F-1)
Cambodia Tiruppur	Rajpipla
Bailhongal	Kadi

Most of these tests have been undertaken regularly by the Technological Laboratory of the Indian Central Cotton Committee as far back as 1924, so that it is possible for the Committee to observe the improvement of any type produced.

Each report gives agricultural details and history, the graders report, machinery used in the test and the spinning test details and results. Copies of these tests may be obtained upon application to the Indian Central Cotton Committee, P.O.B. No. 1002, Bombay.

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Since the slight improvement in production and delivery of yarns which took place at the end of 1938, and which continued during the beginning of 1939, the situation in the spinning mills has remained stationary during the last three months.

It should be noted that although stocks of yarn have not increased further, the prices are much worse than they have been for a long time past. New contracts are hard to obtain.

The capacity of the Belgian cotton industry is now no longer balanced with its sales capacity since the loss of several important export markets. With a view to improving the market, a group of manufacturers has undertaken to purchase several cotton weaving mills in order to destroy the machinery or to sell it on condition that the buyers would destroy an equivalent quantity. Several operations of this kind have already been brought to a successful conclusion. It should be borne in mind, however, that this initiative is strictly private and has not been taken by public bodies.

Wages have not been changed since last April.

The following is the original report in French :—

Depuis le léger redressement de la production et des livraisons de fils, qui s'était manifesté vers la fin de 1938 et confirmé au début de 1939, la situation des filatures s'est stabilisée au cours des trois derniers mois.

Il est à noter cependant que bien que les stocks de fils n'augmentent plus, les prix sont plus mauvais qu'il n'ont été depuis longtemps : on inscrit peu de contrats nouveaux.

La capacité productive de l'industrie cotonnière belge n'est plus en rapport avec ses possibilités de vente, depuis que d'importants débouchés d'exportation ont été perdus.

Dans un but d'assainissement du marché, un groupement de tisseurs a entrepris de liquider divers tissages de coton, en détruisant le matériel ou en le cédant moyennant l'obligation pour les acheteurs de détruire du matériel ancien. Plusieurs opérations de ce genre ont déjà été menées à bonne fin ; il y a lieu de souligner qu'elles résultent d'initiatives strictement privées, sans intervention quelconque des pouvoirs publics.

Les salaires n'ont pas varié depuis avril dernier.

(Association Belge des Filateurs de Coton)

ENGLAND

SPINNING SECTION

Since the last quarterly report on the state of trade in the spinning section of the English cotton industry there has been an improvement in demand and production, as compared with the previous quarter and a year ago. This is to a considerable extent influenced by the national military requirements. Lancashire is watching with keen interest developments which are taking place in regard to Trade Agreements with our Continental neighbours, and it is hoped that when settlements of these agreements are reached Lancashire will obtain a larger share of trade with these countries.

Generally speaking, however, buyers are not anxious to make commitments under existing international circumstances.

In Lancashire mills, spinning American and Egyptian yarn, machinery was engaged approximately as to 85 per cent. of capacity at the time of going to press.

It is expected that at an early date, Royal Assent will be given to the Cotton Industry (Reorganisation) Bill.

MANUFACTURING SECTION

During the past quarter there has been some improvement in business in the cotton manufacturing section, inquiries having been more numerous than for some time past. However, orders are irregular, especially in the export trade, and there is still considerable room for improvement. One factor which has led to the brisker demand has been rising prices due to movements in raw cotton and to the efforts of manufacturers to obtain higher margins to cover higher costs of production consequent upon recent Factory and Air Defence legislation, and the concession of holidays with pay to the workpeople for 1940.

The international situation is still causing lack of confidence amongst buyers and until there is some relaxation there can be no return to normal trade conditions.

FRANCE

No important change has taken place in the French cotton industry since the end of the last quarter.

A certain slowing up in the demand was in evidence at the end of April. However, a slight improvement took place again but prices continued to be unremunerative. Taking into account the mills which are entirely closed; the machinery which is stopped for some cause or other in those establishments which are running and the short-time which is being put into practice by some industrialists, the degree of activity in the industry at the end of May was estimated to be 84.1% for the spinning section and 86.1% for the weaving section.

There has been no alteration in wages during the quarter under review.

The official report in French follows, which also includes figures of imports and exports :—

Aucune modification importante ne s'est produite, au cours du dernier trimestre, dans la situation de l'industrie cotonnière française.

Un certain tassement de la demande s'est produit au cours du mois d'avril, puis un petit courant d'affaires s'est rétabli, mais les prix continuent à être peu rémunérateurs. Compte tenu de l'outillage des firmes ayant cessé leur exploitation, de l'outillage arrêté pour une cause quelconque dans les établissements en activité, et du short time qui pourrait encore être pratiqué par quelques industriels, l'indice d'activité des manufactures ressortait fin mai à 84.1 pour la filature et à 86.1 pour le tissage.

Aucune modification de salaires n'est intervenue au cours du trimestre en revue.

IMPORTATIONS ET EXPORTATIONS IMPORTS AND EXPORTS

				1er trimestre (First quarter)	
				Quintaux Métriques (In metric quintals)	
				Années :	
				1938	1939
A—Importations : (Imports)					
1.	Fils de coton	..	..	1,474	1,181
	(Cotton Yarn)				
2.	Tissus de coton	..	..	2,629	1,835
	(Cotton Piecegoods)				
B—Exportations : (Exports)					
1.	Fils de coton : Exportations totales			21,423	30,234
	(Cotton Yarn—Total Exports)				
	Destinations : Algérie, Colonies et				
	Pays de Protectorat			7,285	9,111
	(Algeria, Colonies and Protectorates)				
	Marchés étrangers			14,138	21,123
	(Foreign Markets)				
2.	Tissus de coton : Exportations totales			105,289	145,392
	(Cotton Piecegoods—Total Exports)				
	Destinations : Algérie, Colonies et				
	Pays de Protectorat			96,006	131,145
	(Algeria, Colonies and Protectorates)				
	Marchés étrangers			9,283	14,247
	(Foreign Markets)				

(Syndicat Générale de l'Industrie Cotonnière Française)

GERMANY

SPINNING SECTION

The general business position of the German cotton spinning section has shown no important change during the second quarter of 1939.

The receipt of new contracts and the demand for running contracts remained unchanged and satisfactory.

The favourable degree of occupation of the spinning mills has, however, kept at the same level as in the previous quarter.

The following is the original German report :—

Die geschäftliche Lage der deutschen Baumwollspinnerei hat auch im abgelaufenen II. Quartal 1939 keine nennenswerte Änderung erfahren.

Sowohl der Eingang an neuen Aufträgen wie der Abruf auf laufende Abschlüsse blieb unverändert befriedigend.

Der günstige Beschäftigungsgrad der Betriebe konnte daher auf dem gleichen Stande wie im vorausgegangenen Berichtsquartal gehalten werden.

(Fachgruppe Baumwollspinnerei)

WEAVING SECTION

The slight retrogression in the receipt of orders which took place at the end of April has not only been entirely offset by an improvement in demand in May, but if one compares the whole of the second quarter with that of the first quarter one notices a slight improvement in the receipt of contracts.

With production remaining approximately the same but owing to this increase in demand, the period of delivery required at the end of the second quarter as compared with that of the first quarter was somewhat increased and assured the industry of complete occupation for approximately $3\frac{1}{2}$ to 4 months.

The average degree of occupation of our grey cloth looms remained at a satisfactory level. On the other hand, however, by reason of several national holidays and at the same time the usual operatives' holidays, production was slightly smaller than in the first quarter.

The following is the original report in German :—

Ein im April eingetretener leichter Rückgang der Aufträge ist durch eine verstärkte Nachfrage im Mai nicht nur vollkommen ausgeglichen worden, sondern es ist, wenn man das ganze II. Quartal in Betracht zieht, gegenüber dem I. Quartal sogar eine leichte Erhöhung des Neueingangs an Aufträgen zu verzeichnen.

Bei ungefähr gleichbleibender Produktion und ebenso gleichbleibendem Abruf hat sich infolge dieser Erhöhung des Auftragseingangs auch der Auftragsbestand am Ende des II. Quartals gegenüber dem I. Quartal etwas vergrößert und sichert eine volle Beschäftigung für ca. $3\frac{1}{2}$ –4 Monate.

Der gesamte Ausnützungsgrad unserer Rohwebstühle blieb auf befriedigender Höhe und war lediglich infolge mehrerer gesetzlicher Feiertage und der teilweisen Arbeiterferien etwas geringer als im I. Quartal.

(Süddeutsche Bezirksgruppe der Fachuntergruppe Rohweberei der Fachgruppe Baumwollweberei)

HOLLAND

Conditions in the spinning section of the trade have been slowly improving during the last few months. There is a little more demand for yarns and most spinners are fairly well engaged. On the whole, prices are unsatisfactory and cheap imports of yarns, chiefly from Belgium

and Lancashire, make it difficult to improve spinning margins.

In the manufacturing section there is also some improvement. Sales for home trade have been rather satisfactory and it seems that the favourable weather during the early summer months has had a good effect upon the off-take for cotton goods.

The demand for export, which is mostly limited to those markets where quota's exist, is also somewhat better and most buyers are pressing for deliveries, which shows that the sales in the overseas markets are on the whole satisfactory.

There has not been any improvement in selling prices yet but altogether there are signs of a gradual and regular improvement.

HUNGARY

Since January the condition of the Hungarian cotton industry has become more satisfactory. On the whole, mills are now working full time (48 hours per week), but often they are working in two shifts (80-96 hours per week). The degree of activity of the cotton industry has been increased, in comparison to the lowest point of activity in the previous year by about 15 per cent.

At the end of the period under review minimum wage rates (fixed by the Government) have been increased by about 20 per cent. In addition to this alteration in minimum rates the general wage level of the Hungarian textile industry has been increased considerably. Calculated on basis of the bulk of wages, the new wages level is at 8-10 per cent. higher than heretofore.

(Magyar Textilgyárosok Országos Egyesülete)

INDIA

Unsatisfactory reports continue to come to hand regarding the state of the Indian cotton industry in general. About 10,000 mill operatives in Bombay City have been thrown out of employment, and more are likely to be idle soon, as a result of the continued depression in trade. According to the *Times of India*, about a dozen mills have either done away with night-shift work or have notified their employees that it will be discontinued within a month. The situation in other centres, including Cawnpore, is equally bad. The take-off for some months has been very poor, and stocks lying with merchants and mills have been gradually increasing. Prices of cloth are abnormally low, and in many cases 12% to 20% less than they were a few months ago. Competition from Japan and China has been more severe than ever.

The trade depression has been accentuated by the new taxation, both Provincial and Central. The heavy increases in wages, which were granted in 1938, have also contributed to the present state of affairs.

The Ahmedabad Millowners' Association is reported to be collaborating with the Bombay Millowners' Association for an all-India move for restriction of production with a view to counteracting the depressed condition of the textile industry. The two Associations have addressed

a joint circular to all cotton mills in India asking them to indicate "as to whether, in view of the state of the cloth and yarn markets in India generally in the present time, and the lack of any indications of any substantial improvement in off-take or consumption in the near future, they are in favour of a temporary restriction of production in both day and night shifts."

If a majority vote is in favour, an all-India conference of cotton mills will be called to work out a suitable scheme. This move of the Ahmedabad millowners has caused a flutter in labour circles, where a reduction in wages is feared. The millowners, however, have given an assurance that no such move is contemplated.

ITALY

During the second quarter of 1939 the production of the Italian cotton industry has increased. Sales in the home market have been regular and shipments abroad have shown an improvement as compared with the same period of last year.

Employment remained unchanged.

The following is the original report in Italian :—

Durante il secondo trimestre 1939 l'attività produttiva dell'industria cotoniera italiana è stata in aumento.

Le vendite sul mercato interno sono state regolari; le spedizioni all'estero hanno segnato un miglioramento rispetto allo stesso periodo dell'anno precedente.

L'occupazione operaia si è mantenuta stazionaria.

(Istituto Centrale di Statistica del Regno d'Italia)

The following figures represent the indices of production in the cotton spinning and manufacturing industries in Italy during the periods stated. The year 1928 is taken as the basic year (*i.e.* 100).

(1) COTTON SPINNING

Year	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Monthly Average
1937 ..	81.9	88.8	92	95.1	98.6	98.7	95.3	76.5	95.6	96.4	96.4	99.5	92.9
1938 ..	95.6	97.4	97.2	88.1	88.8	86.8	81.9	68.8	87	92	94.7	92.3	89.2
1939 ..	94.1	97.3	98.2	95.1	—	—	—	—	—	—	—	—	—

(2) COTTON MANUFACTURING

Year	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Monthly Average
1937 ..	79.4	87.8	93.9	94.1	70.6	97.8	96	78.9	95.3	98.7	94	98	90.4
1938 ..	97.4	101.5	104.9	98.1	100.7	96.8	93.8	78.5	94.3	99.8	100.4	96.9	96.9
1939 ..	91.8	95.6	97.3	96.0	—	—	—	—	—	—	—	—	—

JAPAN

Production of pure cotton yarn through to March inclusive showed a decline of 24 per cent. compared with production for September-March, 1937-38. During March, however, yarn production reached 225,674 bales of 400 lbs., the largest amount produced in any month since

January, 1938. Production of the fibre yarns, 45's and above, has more than doubled compared with March, 1938, production.

Exports of cotton cloth during March, totalling 224,887,000 square yards, were the highest since March, 1938, and thus reflected the encouraging sales made in December and January. There has been a recent falling off of export sales, which indicates that the industry cannot hope to maintain the high March figure in the near future. Exports of piece-goods from Japan since September have declined by 15.7 per cent. compared with cloth exports during September-March, 1937-38.

(U.S. Department of Agriculture)

SWEDEN

Trade conditions in the cotton industry remain practically unchanged. Most of the mills are, however, running full time due to the slight improvement in regard to volume of production.

Prices, however, are still very restricted, due to competition from Japan and Italy.

In regard to wages there are no changes being made. The present agreement between the employers' and the workers' associations will expire at the end of this year. *(Svenska Bomullsfabrikantforeningen)*

SWITZERLAND

The brisk demand for cotton and mixed fabrics still continues, this being the ninth month of improved demand, but it has not developed so far that organised short time may be entirely abandoned. The increase in production is finding its limits and is controlled by the lack of skilled labour, especially in the most favoured branches of the industry, e.g., the fine spinning, doubling, fine and coloured weaving sections. During the many years of crisis through which the industry has passed, vacancies were created in the ranks of the operatives which are now very difficult to fill.

In the coarse and medium fine sections the degree of occupation leaves much to be desired; nevertheless, even in this branch of the industry it is possible to note an improvement which is causing prices to increase. No alterations of importance to wages have been introduced.

The original report in German follows :

Die regere Nachfrage nach Baumwollhalb- und Ganzfabrikaten hält nun in den 9. Monat an, sie hat sich aber nicht so weit entwickelt, dass der kollektiven Betriebseinschränkung entraten werden könnte. Die Produktionssteigerung findet in den besonders begünstigten Zweigen, wie Feinspinnerei, Zwirnerei, Fein- und Buntweberei ohnehin ihre Grenzen am Mangel angelernter Arbeitskräfte. Die während der vielen Krisenjahre in den Belegschaften entstandenen Lucken lassen sich nicht im wünschbaren Tempo schliessen. In groben und mittelfeinen Artikeln lässt die Beschäftigung nach wie vor zu wünschen übrig, immerhin ist auch hier eine leichte Besserung zu erkennen, von der auch die Preise profitierten.

Änderungen von Belang sind im Lohnstand nicht eingetreten.

(Schweizerischer Spinner-, Zwirner und Weber Verein)

U.S.A.

The following information has been assembled by the Association of Cotton Textile Merchants of New York from Bureau of The Census reports and information obtained through the courtesy of machinery manufacturers. Cloth production for the non-census or even years has been estimated to correspond to spindle hour activity.

EQUIPMENT											
	1929	1930	1931	1932	1933	1934	1935	1936	1937	1938	1938
Spindles in place at beginning of year.. ..	35,267,086	34,541,486	33,608,494	32,326,526	31,442,174	30,938,340	30,889,484	29,253,444	27,700,194	26,704,476	26,704,476
Increase or decrease from preceding year	1,198,860	725,600	932,992	1,281,968	884,352	503,834	48,856	1,636,040	1,553,250	985,718	985,718
New installation, additions and replacements	320,784	251,936	205,068	143,908	348,568	529,840	214,874	469,316	772,724	178,280	178,280
OPERATION											
Spindles active at any time during year ending July 31	32,417,036	31,246,078	28,979,646	27,271,938	26,894,860	27,742,462	26,700,946	24,864,428	25,410,110	24,774,004	24,774,004
Spindles idle during same period	2,850,050	3,296,408	4,628,848	5,054,588	4,547,314	3,195,878	4,188,538	4,589,016	2,281,084	1,930,472	1,930,472
Average number of active spindles based on twelve monthly reports	30,408,548	27,260,470	25,674,107	23,250,757	24,373,270	25,119,435	23,421,150	23,373,147	24,079,936	22,042,442	22,042,442
Intermittent spindles (being the difference between average active spindles and those active at some time during year)	2,008,488	3,975,608	3,305,539	4,021,181	2,021,590	2,623,027	3,279,796	1,291,281	1,339,174	2,731,562	2,731,562
Percentage relation of average active spindles to spindles in place	86-22°	78-95°	76-39°	71-92°	79-11°	81-19°	75-82°	79-9°	86-98°	82-54°	82-54°
Spindle hours run	99,899,724,476	76,702,655,168	77,793,298,863	70,218,347,911	86,580,232,928	75,711,412,882	76,017,361,934	91,773,252,676	95,591,131,816	75,925,187,178	75,925,187,178
Hours run per average active spindle	3,285	2,813	3,080	3,020	3,481	3,014	3,246	3,926	3,970	3,444	3,444
MARKET											
Production in square yards	8,998,616,000	6,448,392,000	6,955,391,000	6,278,222,000	7,866,040,000	6,878,579,000	7,135,276,000	8,613,837,000	9,445,736,000	7,502,168,000	7,502,168,000
Exports in square yards ..	564,444,000	416,285,000	386,959,000	375,446,000	302,042,000	226,306,000	196,565,000	200,501,000	236,251,000	319,634,000	319,634,000
Imports in square yards ..	61,185,000	35,517,000	34,732,000	29,436,000	41,348,000	41,533,000	63,674,000	114,195,000	147,920,000	58,282,000	58,282,000
Available for domestic consumption	7,895,357,000	6,067,624,000	6,623,194,000	5,932,212,000	7,605,346,000	6,693,806,000	7,012,385,000	8,627,631,000	9,356,505,000	7,240,816,000	7,240,816,000
Population at July 1	121,526,000	123,091,000	124,113,000	124,974,000	125,770,000	126,628,000	127,521,000	128,429,000	129,357,000	130,315,000	130,315,000
Available for per capita consumption in square yards..	64-97	49-29	53-36	47-47	60-47	52-86	54-99	66-40	72-39	55-61	55-61

Spindles in place at the beginning of 1939 numbered 25,986,620.

U.S.A.

The Bureau of the Census announces that, according to preliminary figures 25,645,960 cotton spinning spindles were in place in the United States on May 31, 1939, of which 21,975,222 were operated at some time during the month, compared with 22,109,394 for April, 22,472,330 for March, 22,524,742 for February, 22,440,278 for January, 22,444,784 for December, and 21,341,846 for May, 1938.

The aggregate number of active spindle hours reported for the month was 7,575,184,637. Based on an activity of 80 hours per week, the cotton spindles in the United States were operated during May, 1939, at 81.4% capacity. This percentage compares on the same basis with 84.6 for April, 86.6 for March, 87.8 for February, 85.7 for January, 82.3 for December, and 59.4 for May, 1938. The average number of active spindle hours per spindle in place for the month was 295.

PROTECTORATE of BOHEMIA and MORAVIA

The degree of occupation of our cotton spinning industry during the first and second quarter of 1939 was comparatively good. The American spinning section utilised about 90% of its full capacity. The degree of occupation of the Egyptian section was approximately 105% of full capacity. Several circumstances prevented an increase in yarn prices. The export trade was on the whole poor.

The following is the original report in German :—

Die Beschäftigung unserer Baumwollspinnereien war im I. und II. Quartal 1939 ziemlich gut. Die Betriebe der Amerikaspinnereien konnten durchschnittlich mit 90% ihrer Kapazität ausgenützt werden. Der Beschäftigungsgrad der Macospinnereien belief sich auf etwa 105% der vollen Kapazität. Verschiedene Umstände bewirkten eine geringe Steigerung der Garnpreise. Das Exportgeschäft war ziemlich schwach.

(Hospodarsky Svaz Pradelen Bavlny Zapsane Spolecenstvo S.R.O.)



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RUBBER AND COTTON BARTER PLAN— U.K., U.S.A.

The following is the text of the agreement between the Governments of the United Kingdom and the United States of America for the exchange of cotton and rubber :—

The Government of the United Kingdom of Great Britain and Northern Ireland and the Government of the United States of America, desiring to make arrangements for the exchange of cotton and rubber, have agreed as follows :—

ARTICLE I.

The United States Government will supply to the Government of the United Kingdom, delivered on board ship, compressed to high density, at New Orleans, Louisiana, and at other Gulf and Atlantic deep water ports to be agreed upon between the two Governments, 600,000 bales of raw cotton of the grades and staples which will be specified by the Government of the United Kingdom. The United States Government will make available in adequate quantities for such purpose cotton from the stock on which the United States Government has made advances to growers.

(a) The price will be fixed on the basis of the average market price as published by the Bureau of Agricultural Economics for middling $\frac{7}{8}$ -in. cotton during the period January 1 to June 23, 1939, for spot delivery at New Orleans, plus 0.24 cent per lb. for cost of compression and delivery on board ship, with adjustments in price for other grades and staples according to differences above or below middling $\frac{7}{8}$ -in. quoted in that period.

(b) The cotton will be inspected to determine its classification in accordance with the universal cotton standards for grade and the official standards of the United States for staple; and shall be accepted by experts appointed by the Government of the United Kingdom. Any disputes which may arise will be settled by boards of referees constituted of three members, of whom one shall be nominated by the Government of the United Kingdom.

(c) Samples representing the cotton of the grades and staples specified by the Government of the United Kingdom will be made available for inspection and acceptance during a period of six months beginning 15

days after the entry into force of this agreement, and such inspection and acceptance will be made within a reasonable time after the cotton is so made available. Delivery at the warehouse at the port of sailing, with provision for free delivery on board ship at high density, will be made within 15 days after inspection and acceptance, and storage and insurance charges will be borne by the United States Government for a period of two weeks but no more, after delivery at the warehouse at the port of sailing.

(d) All cotton will be invoiced and accepted on gross weights at the time of delivery.

ARTICLE II.

The Government of the United Kingdom will supply to the Government of the United States, delivered on board ship at Singapore, and by agreement between the two Governments, at other convenient ports, rubber in bales, of the grades which will be specified by the Government of the United States, to a value equivalent to that of the total value of the cotton to be supplied in accordance with Article I of this agreement. In determining such equivalent value the rate of exchange between Straits Settlements dollars and United States dollars shall be deemed to be the average of the buying rate during the period January 1 to June 23, 1939, in the New York market, at noon, for cable transfers payable in Straits Settlements dollars, as certified by the Federal Reserve Bank to the Secretary of the United States Treasury and published in Treasury decisions.

(a) The quantity of rubber will be calculated upon the average market price as published by the Department of Statistics in the Straits Settlements for No. 1 ribbed smoked sheets, during the period January 1 to June 23, 1939, for spot delivery at Singapore, plus 0.25 Straits Settlements cent per lb. for cost of baling and delivery on board ship, with adjustments in price for other grades according to differences quoted in that period.

(b) The rubber will be inspected and accepted by experts appointed by the United States Government. Any disputes will be settled in accordance with the normal custom of the trade.

(c) The rubber will be made available for inspection and acceptance by experts appointed by the Government of the United States during a period of six months, beginning at a date to be agreed upon by the two Governments, and such inspection and acceptance will be made within a reasonable time after the rubber is so made available. Delivery at the warehouse at the port of shipment, with provision for free delivery on board ship, will be made within a period of 15 days after inspection and acceptance, and storage and insurance charges will be borne by the Government of the United Kingdom for a period of two weeks, but no more, after delivery at the warehouse at the port of shipment.

ARTICLE III.

If either Government should find that delivery in accordance with the arrangements specified in Articles I and II is likely to restrict supplies available to commercial markets unduly, or to stimulate undue price



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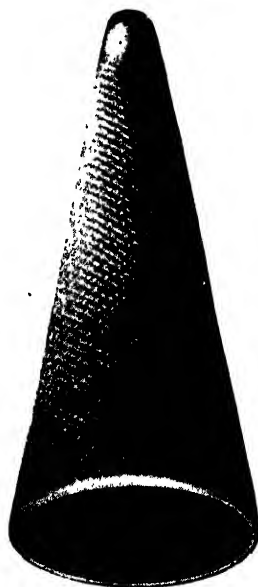
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increases, the two Governments shall consult with a view to postponing delivery or taking other action in order to avoid or minimise such restriction of supplies or such price increases.

ARTICLE IV.

The intention of the Government of the United Kingdom and of the United States Government being to acquire reserves of cotton and rubber respectively against the contingency of a major war emergency, each Government undertakes not to dispose of its stock (otherwise than for the purpose of replacing such stocks by equivalent quantities in so far as may be expedient for preventing deterioration) except in the event of such an emergency. If, however, either Government should at any future date decide that the time has come to liquidate its stock of cotton or rubber, as the case may be, it may do so only after (a) consulting the other Government as to the means to be employed for the disposal of such stock, and (b) taking all steps to avoid disturbance of the markets. In no case may either Government dispose of such stocks, except in the case of a major war emergency, before a date seven years after the coming into force of this agreement.

ARTICLE V.

The Government of the United Kingdom will use their best endeavours to secure that the export is permitted, under the International Rubber Regulation Scheme, of an amount of rubber approximately equivalent to the amount of rubber to be supplied to the United States Government under this agreement in addition to the amount of rubber which would, under the normal operation of the scheme, be released to meet current consumption needs.

ARTICLE VI.

Each Government undertakes, in shipping to its own ports the stocks of cotton and rubber, respectively, provided for in this agreement, so far as may be possible to distribute the tonnage equally between the ships of the two countries, provided that the shipping space required is obtainable at reasonable rates. Consultation for the purpose of giving effect to this article shall be between the Board of Trade and the Maritime Commission.

ARTICLE VII.

Should the United States Government, before the delivery is completed of the cotton provided for in Article I of this agreement, take any action which has the effect of an export subsidy, they will deliver to the Government of the United Kingdom an additional quantity of cotton proportionate to the reduction in price below that provided for in Article I of this agreement caused by such action.

ARTICLE VIII.

The present agreement shall come into force on a date to be agreed upon between the two Governments.

THE RUMANIAN COTTON INDUSTRY

With the development of a cotton-textile industry, Rumania has increased raw-cotton imports and is encouraging successfully domestic cotton production. The weaving mills now consume approximately 90,000 bales of 478 lbs. of raw cotton a year and, when operating at full capacity, supply 80 per cent. of the domestic cotton-cloth consumption.

Cotton growing in Rumania has been a recent development, production increasing from less than 100 bales before 1932 to approximately 3,000 in 1938. The type of cotton produced is considered superior to Indian cotton and similar in quality to American. It is white in colour, clean, easily bleached, dyed, and mercerised, and has an average staple length of about $\frac{1}{8}$ -inch. Domestic production supplied only about 3 per cent. of the 1938 requirements.

Imports of raw cotton in 1938 were more than five times as large as those of 1932. The principal suppliers last year were Egypt, the United States, and Great Britain, with Egypt accounting for over half the quantity imported. In earlier years the United States was the chief source of Rumania's cotton supply. The reason given for the shift is that, although Egyptian cotton is more expensive, Rumania encounters less difficulty in the allotment of exchange for cotton purchases from Egypt.

RUMANIA : COTTON ACREAGE AND PRODUCTION AND IMPORTS OF RAW COTTON AND COTTON YARN

Year	Acreage Acres	Production Bales †	Imports	
			Raw Cotton * Bales †	Cotton Yarns 1,000 lbs.
1931	225	39	16,714	—
1932	830	358	17,083	—
1933	5,431	592	22,858	66,164
1934	1,594	354	26,321	62,551
1935	2,271	653	27,668	51,149
1936	3,610	1,479	43,423	50,794
1937	4,448	1,461	77,175	59,615
1938†	12,407	3,000	93,645	30,900

* Includes linters † Bales of 478 lbs. ‡ Preliminary.

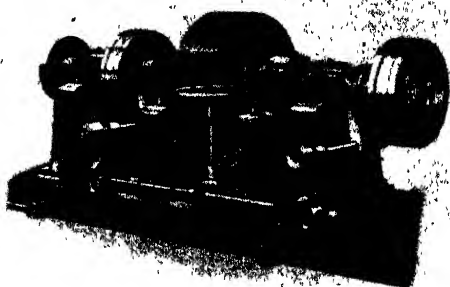
Cotton spindles have increased from 35,600 in 1927 to 216,000 in 1938, which accounts for the increased imports and interest in domestic production. Rumania, however, is still dependent on foreign countries for yarn requirements for rural consumption. Coarse cotton yarns, called "peasants' yarns," make up 70 per cent. of the total quantity of imported yarns. These "peasant yarns" are totally exempt from taxation. The Rumanian mills refuse to manufacture them because it is not profitable to do so, although it is reported they possess the necessary equipment. The principal suppliers of cotton yarn to Rumania in 1938 were Czecho-Slovakia, Germany, Italy and Great Britain.

(Foreign Crops and Markets)

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MANCHOUKUO COTTON INDUSTRY CONTROLLED

The following is extracted from the *Oriental Economist* :—

The annual demand for cotton in Manchoukuo is 650 million square yards. The bulk of the cotton yarn consumed was formerly imported from Japan and the domestic production was comparatively small, but since the China incident began, Japan has been restricting the exportation of cotton piecegoods to Manchoukuo, and Manchoukuo itself has begun importing raw cotton. In consequence, Manchoukuo's demand for cotton goods has not been fulfilled satisfactorily, and so the prices have risen considerably. Fully aware of the difficulty of depending upon Japan for the supply of cotton goods, the Manchoukuo Government recently applied strict control over the cotton industry with a view to achieving self-sufficiency.

On March 25 the Government promulgated and enforced a law for the control of consumption of raw cotton and cotton goods, under which the Manchoukuo Cotton Spinners' Association, organised by the Government, and those engaged in the cotton industry became a State organ for distribution. The idea is to control the distribution of raw cotton, cotton yarn and cotton cloth by the following method : the import of raw cotton is placed on a licence system. The Manchoukuo Cotton Spinners' Association buys all the imported cotton and the home-produced cotton bought by the Manchurian Cotton Company, in order to distribute it among the spinning companies. The goods manufactured by the spinning companies are in turn purchased by the Manchoukuo Cotton Spinners' Association and supplied to the distributors, who sell them to wholesale and retail dealers for re-sale to general consumers. All these transactions, from the Association to the consumers, are carried on at fixed prices. Control fees are charged at the rate of 7 per cent. of the profits made by the spinning companies since the outbreak of the present hostilities, and thus far have amounted to Y.4 million which has been added to the purchase fund of the Manchoukuo Cotton Spinners' Association.

As a result of this State control, the spinning companies are no longer allowed to purchase raw cotton at will. Moreover, it prevents them from making as much profit as before, although the margin is said to have been levelled down to something like 15 per cent. which is not extremely low. A more difficult problem is the quantity of raw cotton to be distributed to the spinning companies.

The figures as of the end of last year show that there were about 320,000 spindles and more than 4,000 looms being operated in Manchoukuo, and when the 150,000 spindles now being installed are ready, something like 1,200,000 piculs of raw cotton will be required. Only about 150,000 piculs are produced at home, and any additional requirements have to be imported. As neither American nor Indian cotton can be imported owing to the exchange control, Manchoukuo will have to depend on North China. Last autumn Manchoukuo requested

North China to supply 900,000 piculs, but only 560,000 piculs were allotted. Up to April this year 310,000 piculs were obtained and the remaining 250,000 piculs were expected to be furnished later but this expectation was based on the assumption that the total cotton supply to the market in North China would be 3,300,000 piculs, whereas the present movements of cotton yield indicate that the total will more probably be in the neighbourhood of 1,500,000 piculs, in which case, the import quota assigned to Manchuria will be reduced to about 115,000 piculs. Thus it appears that cotton supplies for Manchoukuo will become more limited.

With the cotton shortage becoming quite serious, the Government is trying to relieve the situation by compelling the spinning companies to mix 30 per cent. of staple fibre and by purchasing cotton from North China, but even this effort, it is feared, will have very little effect. The chances are that the spinning companies in Manchoukuo will be compelled to make a drastic reduction in the number of spindles.

RECENT EVENTS IN THE MEXICAN COTTON INDUSTRY

Specially contributed by Curtis Vinson

The new collective labour contract for the Mexican cotton textile industry, completed the past March 31 after nearly two years of discussion, precipitated strike trouble early in June in the Orizaba region, Veracruz, that threatens to affect the whole industry unfavourably.

Workers in two mills of the Compania Industrial de Orizaba, S.A., French owned and one of the largest textile enterprises in Mexico, went out on strike June 3 following the refusal of the company to accede to provisions of the new contract on the grounds that it was discriminatory.

For a number of years, mills in the Orizaba region have paid higher salaries in a number of divisions than mills in the Puebla, Federal District and other centres of the industry. This has come about largely by reason of the fact that the Orizaba area has been a major battleground of the Mexican labour movement almost from the latter's inception.

During the administration as Governor of Veracruz a number of years ago of Col. Adalberto Tejeda, marked salary increases, sick and accident pay and various other benefits to workers of the Orizaba mills were inaugurated. This was in a way the real beginning of the improvement in the status of the textile workers of the country.

As the result of these developments the Orizaba mills have paid better wages and granted more benefits to the workers than mills in other sections, despite the economic disadvantage that this laid upon them.

This question of wage differentials in different centres of the industry has long been a point of protest and controversy. The industry's first collective contract, adopted in 1927 following discussions that started in 1925, came to grief because of the wage differentials permitted.

Protesting that the new contract does not establish a uniform wage scale as was its announced purpose, but in its present form would require them not only to meet new increases but to retain the ratio of increase over other mills that they have been paying, the Orizaba mills have declined to agree to the new schedules. To do so, they say, would increase their expenses to a point that would prohibit operation. They are basing their hope for relief on a statement several weeks ago by President Lazaro Cardenas in which he told the industry he would not declare obligatory any new wage schedule not based on equal wages by divisions for workers throughout the whole industry.

Although presidential decree putting the new contract into effect has not been issued, the workers claim the new wage scale became effective April 28 when the period for acceptance by the companies ended. The Federal Labour Board in decision in May held the new schedule to be in effect. All the Orizaba mills declare they did not agree to the new schedule at the employer-worker convention that drew it up, but the Labour Board's decision was that adoption by the convention made the new contract binding upon all.

With this situation prevailing, workers at the Rio Blanco mill (at Rio Blanco, Veracruz) and the Cocolopam plant (at Orizaba, Veracruz) of the Compania Industrial de Orizaba, better known as the Cidosa Company, struck June 3. This caused stoppage of operations at three power plants of the company which in turn closed down its two other mills in the Orizaba area as well as other industrial plants to which it supplied commercial power. The two mills of the Cidosa Company closed through lack of power are the San Lorenzo and Cerritos mills, at Nogales, Veracruz, and Orizaba, respectively. The workers in these latter plants are not on strike, however, the company having reached an agreement with them.

Other mills in the Orizaba area that were still operating late in June but watching the situation carefully included the Fabrica de Santa Rosa's plant at Ciudad Mendoza, French owned, and the Fabrica de Mirafuentes' mill at Nogales, Veracruz, British owned.

All cotton mills in the republic were shut down June 6 for one hour in a workers' general sympathetic strike in support of the striking Orizaba mill employees. Possibility of sympathetic strike on the part of workers of other industries threatened.

In the meantime, officials of the Orizaba mills have been in conference with Labour Board officials in an effort to solve the difficulty. The company representatives said they saw no possibility of changing their stand because of the impossibility of shouldering the increased cost the new contract in its present form would mean for them. Mills of the other areas have accepted the schedule.

Under the new contract textile workers will get a wage increase ranging from 16 to 26 per cent. For the 45,000 workers of the Mexican industry this will mean an annual salary increase of 21,000,000 pesos and an increase in social benefits totalling 4,000,000 pesos, an aggregate of 25,000,000 pesos. At the current rate of exchange this is \$5,000,000. The industry has about 200 mills centred in the states of Veracruz (the

Orizaba area), Puebla, Jalisco, Nuevo Leon, the Federal District and elsewhere.

Workers in the six Orizaba mills total about 5,300. These mills represent an investment of \$16,300,000, and as a group about 14 per cent. of the industry.

The Cidosa management points out that the payroll for its four mills at Orizaba under the new schedule would be 7,600,000 pesos a year, an increase over its present wage schedule of 800,000 pesos. Under the schedule of wages set up by the 1927 contract, the Cidosa payroll reached 6,000,000 pesos a year. In March, 1938, the company granted a provisional wage increase of 800,000 pesos. The 1939 contract would add 800,000 pesos, or the same amount as the company granted provisionally in March, 1938, to make the total of 7,600,000. Operating under the new schedule at Puebla, the company's payroll would be only 6,800,000 pesos, it was added.

The Santa Rosa management said its plant, employing 1,600 workers, could operate at Puebla or in any other area than the Orizaba region at a saving of 500,000 pesos a year, even under the old contract, by reason of the difference in the wage schedules.

In illustration of the workings of the new schedule, the case of how a first-class mechanic would be affected was cited. At the Orizaba mills such an employee gets 8.65 pesos a day, while at Puebla and elsewhere 3.50 to 5 pesos under the old schedule. The new tariff calls for minimum of 7.20 pesos a day for a first-class mechanic. Under the new contract the Puebla mills would have to raise the 5 peso a day mechanic to 7.20, or an increase of 2.20 pesos a day. The Orizaba mills would have to increase the pay of 8.65 pesos a day by 16 per cent., or 1.38 pesos a day, to a total of more than 10 pesos for the same class of employee that gets 7.20 pesos at the Puebla mills.

This is caused by provision of the new contract specifying that every employee is to get a rise in pay. In cases where the present pay is above that of the new minimum base, the rise is to be on a graduated percentage basis.

Predictions are that one effect of the new schedule will be to cut down production and bring about price increases.

Total imports during 1938 by Mexico of textile materials, including cotton, artificial silk and wool, amounted to 7,532,387 kilos, valued at 23,175,164 pesos. The six leading countries of supply by value for the year were: Italy, 28 per cent. of the total; Japan, 14 per cent.; Australia, 11 per cent.; Great Britain, 7 per cent.; France, 7 per cent.; United States, 6 per cent. Japan led in both volume and value as exporter of textile materials to Mexico in 1937. Italy jumped into the lead in 1938 by reason of the large volume of rayon yarn that Mexico has been taking from that country since the oil expropriation of March, 1938, a result of the development of barter between Mexico and European countries.

PAID HOLIDAYS IN LANCASHIRE MILLS NEXT YEAR

Following protracted negotiations, an agreement was reached recently conceding the claim of the operatives in the Lancashire cotton spinning, doubling, and weaving industries for holidays with pay.

Following ratification by the Federation of Master Cotton Spinners' Associations, the Cotton Spinners' and Manufacturers' Association and the Lancashire Cotton Corporation (for the employers) and the United Textile Factory Workers' Association (for the operatives), the first payments will be made in 1940. The agreement reached was :—

(1) That arrangements be made to pay for one week's holiday during 1940 on the basis of one-fiftieth of the actual earnings of the previous twelve months.

(2) That preparation for such payment shall commence on the first pay day after this year's annual holiday.

(3) That the money, equal to 2% of each week's wages bill, shall be paid weekly to the credit of an operative's holiday account, which shall be opened either with a bank or some other safe security.

No token payment will be made this year.

ENGLAND —SCHEME FOR REDUNDANT LOOMS

The Cotton Industry (Reorganisation) Bill, which is now before the British Parliament and which is expected to become law in the near future, will set up certain administrative machinery whereby various sections of the cotton industry may bring into force schemes for price-fixing or for eliminating surplus machinery.

In anticipation of the new legislation, the Central Committee of the Cotton Spinners' and Manufacturers' Association have been discussing a draft scheme for eliminating redundant looms from the manufacturing section of the Lancashire Cotton Industry, as it is generally agreed that the number of looms in place is considerably in excess of that required to produce sufficient cloth to meet the present or probable future demand.

The draft scheme will be similar in principle to the Spindles Act (which has been in operation since 1936 for the purpose of dealing with redundant spindleage). It is suggested that a Looms Board should be set up consisting of three independent persons, having power to acquire by agreement redundant looms and premises over a period of three years. For this purpose the Board would be empowered to raise loans backed by Government guarantee up to a certain amount, and these would be repaid by levies compulsorily payable by all cotton manufacturing firms in the country over a period of 15 years. Such levies would probably be based on a fixed amount per annum for each inch of the reed space width. The only compulsory part of the Scheme would be the payment

of levies ; there would be no obligation on the part of anyone to sell machinery and no obligation on the part of the Board to buy any specific plant or premises.

Although it is not essential under the Cotton Industry (Reorganisation) Bill for compensation to be paid to operatives who lose their employment as a consequence of the Scheme, it will probably contain a provision to that effect.

The draft Scheme has been submitted to the nineteen local associations affiliated with the Cotton Spinners' and Manufacturers' Association asking them to consider it and to send in their comments for the consideration of the Central Committee.

THE AUSTRALIAN COTTON TEXTILE INDUSTRY

The cotton spinning industry in Australia in the first half of 1938 comprised six concerns which had a total of 68,700 spindles and a production approximating 11,275,000 lbs. of cotton yarn for the 12 months ended June 30, 1938. Domestic output is limited to yarns not finer than 50s, while imports consist mostly of counts above 50s, the United Kingdom being the principal supplier. A mercerising plant, using imported yarn from the United Kingdom, was established in Australia in 1938. Australia formerly imported large quantities of mercerised yarns from the United States, but in 1938 exports to Australia from the United States of "combed mercerised cotton yarn" amounted to only 616 lbs. (valued at \$1,042) and of "combed non-mercerised" were only 117 lbs. (\$69); exports of carded yarns, not combed, totalled 8,624 lbs. (\$3,050).

A number of mills are engaged in weaving piecegoods from purchased yarns and some of the spinning mills have weaving departments. No official figures as to the number of looms working on cotton cloth are available, but a trade source placed cotton looms in Australia at about 500.

A Sydney mill has recently installed equipment for "pre-shrinking" (shrunk finishing), capable of treating from 40,000 to 60,000 yards of cloth per week, depending upon the type of cloth processed. The mill installed the equipment to treat its own output of cotton tweeds, duck, drill, dungaree, and the like, but they are reported to be in a position to process cloth for other manufacturers and importers. This concern recently organised a branch with a capital of £250,000 to manufacture heavy duck and canvas for military purposes. The plant will be near Sydney and is expected to come into production next year.

Another spinning and weaving concern at Melbourne, which recently received large Government orders for khaki and dungaree cloths has announced plans for the establishment of three branch plants which will involve the expenditure of about £1,000,000; a branch plant at Sydney will have a capital of £500,000, and the mills to be built at Brisbane and Adelaide will each have a nominal capital of £250,000, it is stated. This concern has a plant for the manufacture of tyre fabric nearing completion

at Collingwood near Melbourne. Cotton tyre fabric now is imported duty free, mostly from Canada and the United Kingdom, but there are indications that the question of protection for this new enterprise was to be considered at a tariff hearing.

(U.S. Dept. of Commerce)

THE COTTON INDUSTRY IN CHINA

Imports of cotton into China during March totalled over 105,000 bales of 478 lbs., the largest quantity imported in any month since June, 1932, according to the United States Department of Agriculture.

CHINA : IMPORTS AND EXPORTS OF RAW COTTON, MARCH, 1939 WITH COMPARISONS * (In bales of 478 lbs. net)

Item	March			October-March		
	1937 Bales	1938 Bales	1939 Bales	1936-37 Bales	1937-38 Bales	1938-39 Bales
Imports :						
United States ..	2,722	—	19,510	9,078	†	39,985
British India ..	1,064	742	62,250	6,244	5,052	121,264
Egypt ..	5,530	—	3,451	18,536	307	16,566
Other Countries ..	573	25	20,159	15,813	1,554	40,824
Total ..	9,889	767	105,370	49,671	6,913	218,639
Exports ..	21,903	33,307	1,929	171,425	93,711	140,166

Shanghai Office, Foreign Agricultural Service, and Monthly Returns of the Foreign Trade of China.

* Excluding Manchuria. † Negligible.

The trade now estimates that purchases of foreign cotton to the middle of May reached 800,000 bales, of which 100,000 were American staple, and that total purchases for the marketing year (October-September) will amount to approximately one million bales. Some of the purchases, however, may not reach China before the end of the current season and therefore may not enter into the import figures.

Mill consumption during March for all China, including Manchuria, was estimated at approximately 145,000 bales, the same as in February. The greatly increased demand for foreign cotton in Shanghai continues and has been attributed partially to the increased mill activity, the smaller Chinese cotton crop, the inability at mill centres to obtain cotton from the interior, and the restrictions imposed in the Japanese-controlled areas on the sale of cotton textiles manufactured in Japan.

CONDITIONS IN THE CHINESE COTTON TEXTILE INDUSTRY

New cotton textile mills in Yunnan and Szechuan will place in operation, when completed, 500,000 spindles and 5,000 looms, according to the press. Chungking newspapers also report that out of 60 cotton

mills owned by Chinese and operating in China prior to hostilities, 10 have been completely destroyed by military operations, 12 were badly damaged, 21 slightly damaged, 8 mortgaged or sold to foreign enterprises, and the remaining 9 mills were confiscated by the Japanese military authorities.

The Chekiang Provincial Government is reported to have forbidden farmers in the Japanese occupied areas of the Province to plant cotton, the land being needed for the planting of foodstuffs.

(U.S. Commerce Reports)

TURKEY

In the last issue of the *International Cotton Bulletin* we published an article on the expansion of the Turkish cotton textile industry.

We republish below a further article dealing with the same subject emanating from another source, namely, the U.S. Commercial Attaché at Istanbul, and which appeared in a recent issue of *Commerce Reports*.

The cotton manufacturing industry in Turkey made considerable progress in 1938. Production increased, and an improvement in the quality of local products was noticeable. Certain lines, such as grey, bleached, and printed cotton piecegoods have been competing favourably with imported products. It is estimated that when present construction work has been completed on the Government's cotton mills, the combined capacity of the five plants will comprise 163,502 spindles and 3,324 looms and will provide employment for nearly 13,000 workers. The total cotton consumption of these plants will approximate 17,400 tons annually and the combined production capacity will be about 14,609 tons of cotton yarn and cloth, according to local information. The Government mills are under the direction of the Sumer Bank, the Government agency charged with the realisation of Turkey's "Industrialisation Programme."

The most important of the Government mills is located at Kayseri; in 1938 it produced 619,000 kilograms (almost 1,365,000 lbs.) of cotton yarn, as compared with only 103,000 kilograms (227,000 lbs.) in 1937. The Kayseri plant specialises in the cheaper grades of cotton cloth, both piece-dyed and yarn-dyed; its 1938 production of cotton cloth was 19,242,000 meters (of 1.0936 yards each). The production of the other Government mills in 1938 was reported as follows: Bakirköy mill, 6,203,000 meters; Nazilli plant, 7,819,000 meters; mill at Eregli, 354,000 kilograms of yarn and 1,940,000 meters of cloth. The mill at Nazilli specialises in the cheaper grades of cloth, mostly prints. The Eregli mill produces poplins, bleached goods, and satins. The plant at Bakirköy specialises in the production of grey shirtings; its capacity is to be increased in the near future. Another Government-owned cotton spinning and weaving mill at Malatya, which is nearing completion, will have 26,000 spindles and 432 looms. A number of privately-owned cotton spinning and weaving mills increased their output and improved the quality of their products in 1938, according to trade reports.

Business in cotton yarns and piecegoods in Turkey during 1938 was very brisk. Despite the progress made by the local cotton industry, imports were well maintained. Imports of cotton yarn declined slightly owing, it is said, to the increasing production of local mills. In the trade in cotton piecegoods, prints are the most important item, followed by dyed goods, poplins, bleached cottons, and grey goods, in the order named. Germany, the principal source of piecegoods imports, supplied from 50 to 60% of the total importation of piecegoods into Turkey during 1938. It is estimated that 500,000 pieces of printed goods were imported from Germany in 1938. Italy, the second most important supplier of cotton piecegoods to the Turkish market, increased its trade considerably during 1938. Imports from the Soviet Union and Japan increased in the last half of 1938. The trade in British cotton piecegoods became relatively unimportant in 1938.

Import trade in cotton piecegoods with the United States during the latter half of 1938 was hampered by exchange difficulties. The cotton yarn trade between the United States and Turkey suffered a severe setback in March, 1938, when a decree of the Turkish Government placed cotton yarn imports from the United States on a compensation basis. The decree was later modified to allow the entrance of all goods shipped prior to April 7, but at the end of the year considerable quantities of American cotton yarns were still in Turkish customs houses. Fairly substantial imports of better grades of cotton piecegoods from the United States were made during 1938, despite difficulties.

THE BRAZILIAN COTTON TEXTILE INDUSTRY IN 1938

The following is extracted from a *Report on Economic and Commercial Conditions in Brazil*, by the Commercial Counsellor to H.M. Embassy, Rio de Janeiro, printed and published for the Department of Overseas Trade by H.M. Stationery Office, London. Price 2/- net.

For some considerable time Brazil has been virtually self-supporting in textiles, particularly cotton cloths, other than of fine counts which have not yet been produced in that country. According to statistics furnished by the Ministry for Labour, Industry and Commerce, there are 375 cotton mills throughout the country which, during 1938, produced more than enough cloth for home consumption; some, even, was exported. The cotton textile industry has, in point of fact, been over-producing to a great extent and mills are reported to have been piling up large stocks. Many, indeed most, mills have been working overtime to the extent of two and three shifts of eight hours, and the consequent excess of production has caused some concern in the industry. Investigations are however being made to decide what measures might be taken in order to rationalise the output—either by reducing the number of shifts, or by reducing the hours worked. The measure restricting

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imports of textile machinery, which lapsed in March, 1937, may well be revived. While, as mentioned above, manufacturers have attempted to find outlets for their excess production in overseas markets, it is reported that past shipments have not shown profitable results due to the necessity of meeting the price of dumped cloth of other countries in foreign markets.

WAGES AND WORKING HOURS OF TEXTILE WORKERS IN JAPAN

Statistics of the wages and working hours of industrial workers in Japan are compiled each month by the Japanese Department of Commerce and Industry on the basis of returns collected from representative undertakings by thirteen of the leading Chambers of Commerce and Industry, including those of Tokyo, Osaka and Kyoto. The statistics cover 69 occupations in the textile, metalworking, engineering, pottery, etc., chemical, food and drink, clothing, woodworking and furniture, printing and building industries, together with stevedores and casual day workers. The Table below shows, for occupations in the textile industry, the average daily earnings and average working time in 1938, calculated from the monthly figures published by the Department of Commerce and Industry in the Monthly Statistical Report on Wages in Japan :—

Occupation	Average daily earnings*	Average daily working time		Average number of days worked in a month
	Yen†	Hours	Mins.	
<i>Male workers—</i>				
Artificial silk manufacture	1.48	9	7	25.0
Hosiery	1.44	10	12	25.0
Bleaching, dyeing, etc.	1.76	10	46	25.4
Printing, hand	1.97	9	37	25.0
Printing, machine	1.85	10	53	23.7
Finishing	1.56	10	27	24.8
<i>Female workers—</i>				
Silk reeling	0.70	9	58	25.7
Silk yarn spinning	0.75	8	55	25.6
Silk yarn throwing	0.66	9	48	24.0
Silk hand loom weaving	1.18	9	35	24.5
Silk power loom weaving	0.85	9	47	24.7
Artificial silk power loom weaving ..	0.83	10	3	25.9
Cotton spinning	0.77	8	33	25.2
Cotton power loom weaving	0.74	9	7	25.5
Woollen yarn spinning	0.85	9	5	24.6
Wool power loom weaving	0.96	9	16	24.9
Hosiery	0.73	10	1	24.7

*Inclusive of overtime and night-work payments, output, etc., bonuses and food allowances, but exclusive of all other allowances or payments in kind.

†One yen equals 1s. 2d.

(Ministry of Labour Gazette)

JAPAN AND CHINA

According to reports from Tokyo, the Japanese Cotton Spinners' Cartel is understood to be considering the transference of the cotton industry on a large scale to China with the object of reducing costs of production. It is admitted that the industry can no longer prosper under present conditions.

Although manufacturing costs in Japan are still comparatively low, nevertheless they have risen to such an extent relatively in the last two years as to imperil the ability of Japan to compete on the world market for cotton goods.

A further reason for the proposed transference of the Japanese cotton industry to China is stated to be the penetration of English and American capital into the Chinese cotton industry. It has already become possible for the Chinese factories operating with such capital to recapture important foreign markets from which Japan ousted England in former years. In the next few years the chief peril it is stated, will be India not Lancashire.

In the last twenty months the consumption of cotton by the cotton mills has risen unceasingly and this trend is continuing. Should another war not intervene, the chief consumers of raw cotton in the near future will be China, India and Soviet Russia, in addition to Japan. All the three countries first mentioned would then compete for business on the world market. To meet this threatened attack there is only one thing for the Japanese cotton industry to do, that is to reduce its production costs and to obtain freer access to raw materials, and this is only possible if the greater part of the industry is transferred to China.

U.S. SPINDLES ON STAPLE FIBRE

The Director of the Bureau of Census, Washington, announces that 432,366 spindles in cotton mills were operated on spinning rayon staple fibre only during the month of April, 1939, and 86,308 spindles on rayon staple fibre mixed with cotton. All of the cotton spinning mills were canvassed for the data, thus making available reliable information as to the extent of this activity. The spindles reported on rayon staple fibre only were not included in the total number of active cotton spindles, nor were the active hours for such spindles included in the total number of active cotton spindle hours.

In addition to the above some spindles in cotton mills are reported as spinning rayon staple fibre and wool mixed, and some staple fibre and silk mixed. There were also upward of 100,000 spindles operating on staple fibre in former cotton mills which have gone over entirely to the spinning of rayon staple fibre.

The total number of cotton spinning spindles in place on April 30, 1939, was 25,680,020, of which 22,109,394 were active at some during the month, and the number of active cotton spindle hours totalled 6,892,786,934.

NICARAGUA—COTTON MILL AT MANAGUA

A small cotton mill has been erected at Managua and is expected to begin operations shortly. At present a number of operatives are being trained. The owner is engaged in cotton production on a large scale in Nicaragua, according to information received.

Nicaragua imported cotton manufactures to the value of \$1,249,000 in 1937, the latest year for which details by countries are available. Of this amount, imports from the United States accounted for 42.9 per cent. (\$536,000), the United Kingdom 21 per cent. (\$262,000), Germany 16.7 per cent. (\$208,000), and Japan 13.9 per cent. (\$173,000).

(Textiles and Allied Products)

U.S.S.R.

The large Tashkent Cotton Textile Combine in Uzbekistan is being extended by 23,000 spindles, and at the end of the year over 80,000 new spindles will be in operation. The Barnaul Mélange Textile Combine, in Siberia, is building a mill for 92,000 spindles. For the manufacture of satinette and calico in Stalinabad (Tajikistan), a spinning mill of 35,000 spindles will be completed in 1940, and the combine will produce 14,500,000 yds. of fabric a year. At Vologda (RSFSR) a linen combine designed to produce about 21,750,000 yds. of cloth a year is being built. In Kalinin (on the Volga) a combine for the manufacture of rayon is under construction.

LABOUR LEGISLATION IN FRANCE

On April 21, 1939, the President of the French Republic signed a number of Decree-Laws relating to working hours and payment for overtime.

Provisionally, the normal duration of the working week has, in effect, been extended from 40 to 45 hours by a Decree-Law which provides that, as a temporary measure, an increased rate of remuneration is no longer to be paid for hours of work exceeding 40 but not exceeding 45 in a week. For hours of work in excess of 45 a week, the Decree-Law fixes the rate of remuneration at 5% above normal wage rates; but, where the rate of additional payment for overtime is already less than 5%, this rate may not be increased. In undertakings in which the number of workers employed is less than the number employed at the second pay-day in November, 1938, the scale of payment for work exceeding 40 hours a week is to remain, for a period of six months, at the rates laid down in the Decree-Law dated November 12, 1938 (viz., 5, 10, 15 or

25% above the normal wage rates, according to the size of the undertaking and the number of hours of overtime worked during the year), except as otherwise authorised by the labour inspector.

Except with the sanction of the labour inspector, no staff reductions may take place in any undertaking in which, under the present Decree-Law, working hours are extended beyond 40 a week, or, if the working hours already exceed 40 a week, beyond the duration of working time during the month preceding the date of publication of the Decree-Law.

In the public administrative services, in industrial undertakings operated by, or under concession from, the State or the Departmental or communal authorities, and in public undertakings, working hours are to be 45 a week, except in cases in which the legal working time already exceeds this figure, and no additional remuneration is payable for any increase in working hours which may result from the operation of the Decree-Law. A Decree is to be issued by the Ministers of Public Works and of Labour regulating the application of this section of the Decree-Law to the railways.

(Ministry of Labour Gazette)

U.S.S.R.

The total number of cotton spinning spindles in the U.S.S.R., according to a recent statement by the Commissar of the Textile Industry, amounts to 8.2 million. In order to increase the spinning capacity of the cotton textile industry as well as to replace some of the obsolete machinery now in place, an installation of more than three million spindles is envisaged by the Third Five Year Plan (1938-42). Such installation, it is expected, will do away with the present disproportion existing between spinning and weaving, which had handicapped the expansion of cotton textile production in recent years. It is also to enable the execution of the planned increase in the output of cotton fabrics. Production of cotton fabrics during the five-year period 1938-42 is to amount to 20,800 million meters, as compared with 15,150,000,000 yards actually produced during the preceding five years. This would be an increase of 37 per cent. The goal for the year 1942 is 5,360,000,000 yards as compared with 3,760,000,000 yards produced in 1937, or an increase of 42 per cent.

The cotton textile industry has not been successful in carrying out its plans in recent years, with the 1938 plan non-executed by 15 per cent. However, a certain improvement was evident toward the end of 1938, and a recent report indicates that for the first time for many months past, the monthly plan had been fully executed in February, 1939.

EDITOR'S NOTE.—*The above statement, if correct, shows that press reports which have appeared sporadically during recent years regarding increases in cotton spindleage in U.S.S.R. have been greatly exaggerated. Great difficulty is experienced by this Federation in obtaining accurate statistics of cotton spindleage and cotton consumption and stocks in the U.S.S.R.*

NEW DRESS GOODS FACTORY AT MALATYA (TURKEY)

The installation of the dress goods factory at Malatya, part of the industrial Five Year Plan, is, to a large extent completed. The original project envisaged 11,000 spindles and 432 looms. Another 15,000 spindles were however ordered later. The whole factory will be completed towards the end of September of this year. Trials are already under way in certain departments. The annual production of the completed plant is estimated at 10,287,000 metres of fabric and 2,650,000 kgs. of yarn. The value of this production will be around 6,000,000 Turkish liras. The new mill will find employment for 2,500 workers engaged on two shifts.

The mill will be engaged in the production of dress goods for ladies' wear, most of this market having hitherto been supplied from abroad. Thus a considerable saving in currency will be effected. Moreover it is estimated that the production of this class of goods will be sufficient to meet the present requirements of the whole country.

The raw material, also produced in the country, will consist of raw cotton exclusively from the Igdir district. Cotton production around Malatya itself is also being more extensively developed in view of these new possibilities.

The Malatya factory has cost about 5,000,000 Turkish Liras.*

* 110 LTqs. = £1 sterling.

YUGOSLAVIA—CEMENT FOR U.S. COTTON

According to the *Textile Weekly* of Manchester the Yugoslav Government is reported to be giving serious consideration to a proposal to barter cement for U.S.A. cotton. In consequence of the boom in building in U.S.A. there is a great demand for cement, whereas the Yugoslav cement factories are only operating at 40 per cent. of capacity. The Government thus proposes to approach the U.S.A. Government with a view to coming to an agreement to supply cement in exchange for cotton.

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SPINNING ROOM HUMIDITY

The following is extracted from an article written by H. L. Kempaner, of the *Carrier Corp.*, and published in a recent issue of the *Textile World*.

Moisture content during the process of spinning has an extremely important effect upon the ultimate success of cotton manufacturing. Proper conditioning of the spinning room air, by allowing a more even drafting, aids considerably in the elimination of the so-called drafting wave caused by the smooth, slippery texture of the cotton fibres. Moisture content in the proper degree allows the fibres to cohere evenly with a minimum twist. This is a decided advantage (since twisting is costly), and is particularly noticeable when short-staple cotton is being spun.

Regain is a function of the relative humidity and dry-bulb temperature, but the effect of the dry-bulb temperature is so minute that it can normally be neglected. The manufacturer can, through proper regain, prevent considerable loss of material and labour values, allow the yarn to gain in strength, and eliminate excessive dry weight. Definite requirements of humidity vary with the product being manufactured. Consequently, each case should be studied thoroughly beforehand, in order to determine under exactly what humidity conditions the best results can be obtained.

The manufacturer should realise that air-conditioning the spinning room only, will not produce the desired final regain in the subsequent finished product. Proper conditioning during the processes which follow spinning is of the utmost importance.

Fine yarns are usually spun from weaker cotton fibres to obtain strength. This statement, taken literally, sounds unbelievable. However, since the weaker fibres are finer, there will be more fibres per cross-sectional area for any given yarn count. The larger number of fibres implies a better distribution of weak links in the act of drafting.

To measure properties of single yarn is practically impossible. Although it is true that yarn will break at its weakest place, that weak place may dart from one position to another all along the yarn during the time any pull is exerted on it. If yarn were devoid of this property of self-adjustment, cotton spinning would be impossible, especially in the finer counts. Where two singles are twisted together for a 2-ply yarn, this instability is largely obliterated.

EFFECT OF HUMIDITY

in spinning on strength and uniformity of cotton yarn. Table shows averages of tests, ring size, and average of each group.

(Reprinted through courtesy of A. N. SHELDON, from "Miscellaneous Scientific Papers of F. P. Sheldon & Son.")

Ring Size	Yarn Size	Aver. Break	Aver. Factor	Size Var. %	Ring Size	Yarn Size	Aver. Break	Aver. Factor	Size Var. %
Test No. C1					Test No. C5				
1½	27-81	48-9	1359	11-5	1½	26-02	56-6	1534	12-9
1½	27-70	49-5	1371	11-8	1½	26-90	57-5	1551	13-1
2	27-81	49-4	1372	12-2	2	26-81	57-9	1552	10-5
2½	28-34	48-3	1369	10-1	2½	26-61	58-5	1555	11-2
Ave.	27-01	49-0	1368	11-4	Ave.	26-83	57-6	1545	11-9
Test No. C2					Test No. C6				
1½	26-88	51-5	1394	12-1	1½	26-72	59-7	1596	11-5
1½	26-97	55-1	1484	14-8	1½	27-27	57-9	1578	10-0
2	27-18	52-2	1434	13-5	2	27-15	59-2	1606	11-0
2½	26-77	54-4	1455	14-8	2½	26-42	60-6	1601	10-7
Ave.	26-05	53-3	1442	13-8	Ave.	26-90	59-3	1595	10-8
Test No. C3					Test No. C7				
1½	26-69	53-7	1427	12-2	1½	26-81	55-8	1495	11-5
1½	27-89	52-2	1455	15-5	1½	25-86	61-3	1586	13-4
2	27-53	52-1	1433	13-8	2	26-49	60-2	1593	14-2
2½	26-96	53-8	1449	10-9	2½	26-25	59-5	1561	14-1
Ave.	27-24	52-9	1441	13-1	Ave.	26-35	59-2	1559	13-3
Test No. C4					Test No. C8				
1½	27-20	56-6	1539	10-5	1½	26-30	57-7	1517	13-1
1½	27-70	54-8	1519	11-7	1½	26-70	58-5	1563	15-5
2	27-40	55-1	1492	11-9	2	26-74	59-6	1593	14-7
2½	26-90	56-5	1519	11-6	2½	26-37	60-3	1592	12-5
Ave.	27-30	55-6	1517	11-4	Ave.	26-52	59-0	1566	13-9

Due to readjustments in the spiralled packing of the fibres, it appears that in ordinary lengths of good yarn each fibre usually takes its share of strength. Weakness in the yarn is due generally to insufficient cohesion of the fibres. The extent to which the fibres will cohere without slipping on one another depends largely on the twist angle, whether this be fairly simple as in single yarn or more complex as in double yarn.

In the spinning of fine yarns a proper humidity is necessary, normally 60 to 65 per cent. relative humidity. Ordinarily, any increase in this percentage is of no advantage. However, this naturally would depend on the fineness of the yarn, length of staple, and other local conditions. The room humidity is important in the elimination of static electricity. This is desirable in fine yarn spinning, due to the delicacy of the weaker fibres used to achieve greater strength. Since fine yarns are generally spun from a better grade and longer staple cotton than are coarse yarns, there is less need to assist in the cohesion of the fibres. Consequently a slightly lower relative humidity can be maintained than for coarse yarns.

On the other hand, should a shorter staple be used in the spinning of fine yarns, considerably more twist would be required for adequate strength and proper spinning. In this case, relative humidities, of say, 65 to 70 per cent. would be desirable, since this greater twist would render the yarn relatively slow to absorb moisture. Furthermore, with lower humidity, the yarn would have a greater tendency to kink or curl.

Another consideration would be whether or not preceding processes have the benefit of air conditioning. If, for instance, the roving reaches

the spinning room in proper condition, good spinning is facilitated. Contrary to this, it would be difficult to know exactly what relative humidity would produce favourable results if the roving reached the spinning frame in a dry, uneven state.

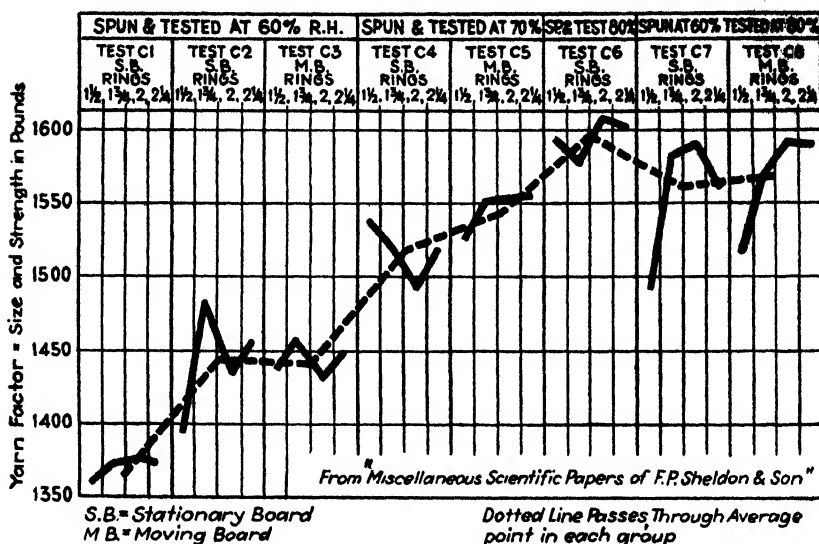
Short staple cotton cannot be spun into so fine a yarn as long staple cotton, since the smaller surfaces of the short fibres do not give the same total cohesion. It would be possible for short-staple cotton to produce as fine a yarn as long staple if sufficient twist were provided. However, it is unlikely that short-staple yarn would be as durable, because the tendency of yarn to untwist would come into play more quickly with yarn spun from short fibres.

Coarse yarns will, in general, run better with a relative humidity of from 65 to 70 per cent. as against the slightly lower humidity range for fine yarns. This may be due generally to the greater speed with which coarse yarn is spun, bulkier roving, and shorter staple cotton—all resulting in a higher twist being required, so that the yarn is slower to absorb moisture from air.

From laboratory tests on cotton, it has been discovered that dry cotton fibres are about 40 per cent. stiffer than wet ones. Moisture is important in spinning coarse yarns from short staple cotton, as it makes the fibres more pliable, so that greater twist can be applied. Also, it improves the surface friction of the fibres by increasing cohesion. Similar tests show that the capacity of raw cotton to absorb moisture amounts to a maximum of approximately 17 per cent. at a relative humidity of 95 per cent., starting from a bone-dry state. At 70 per cent. relative humidity cotton can absorb approximately 50 per cent. as much water as it can at 95 per cent. relative humidity, or in other words, 8.5 per cent. moisture absorption, for purposes of regain. Tests indicate also that normally two days are required for the moisture content of cotton to reach equilibrium, when any noticeable change in humidity is made.

Humidity is the primary factor (with temperature secondary) from the standpoint of production in the above analyses, as long as the temperature remains within a normal range. Consequently this brings to light the resulting necessity for the control of relative humidity to keep the cotton in a constant state of equilibrium. Lately, more mill executives are considering the welfare of the employees as regards their better health, greater comfort, and larger man-hour productive ability. To obtain proper humidity in a spinning room, there is more to consider than the mere adding of moisture to the air. The proper distribution of conditioned air is of primary importance to dissipate the relatively large internal heat load imposed by the machinery in order to maintain a desirable condition for comfort and assure a greater uniformity of relative humidity throughout the entire spinning room—and especially between the frames. This distribution is accomplished most economically with the combination split-type system which combines the best features of a central-station system and an atomiser spray-type system. This type of system was first brought out some twenty to twenty-five years ago. The earliest applications of this split system were made for weaving or other processes which required comparatively high humidities. The economic

advantages of this type of system increase directly and in almost geometric progression with increases in relative humidity. A balance point exists at approximately 65 per cent. relative humidity. At relative humidities below 65 per cent. this type of system is more expensive than straight central-station type systems; and at relative humidities above 65 per cent. it is less expensive.





When ordering New Spinning Rings bear in mind that there are 3 common flange widths from which to choose :—

For coarse and medium counts flange 2 is usual.

For medium and finer counts flange $1\frac{1}{2}$ is popular.

For really fine counts try flange 1. The narrower the flange the stronger the traveller.

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that the size variation of the yarn is slightly greater with the moving board.

Tests C6 and C7 indicate that the yarn spun and tested at 80 per cent. is slightly stronger than yarn spun at 60 per cent. but tested at 80 per cent. The reason for this is that yarn spun at 60 per cent. is not so permanently set as that spun at 80 per cent. and, when subjected to tests at 80 per cent. the fibres become more pliable, so that the yarn begins to untwist and consequently becomes weaker. If a coarse yarn were used in a test similar to C7, the above results would be even more noticeable, since a greater twist would be required. The yarn size is appreciably more uniform in Test C6, where spinning and testing is done at 80 per cent.

Although these tests were run at as high as 80 per cent. relative humidity, it does not mean that humidities as high as 80 per cent. would generally be suggested, except under special conditions which had been carefully studied beforehand.

Since tests conducted under various conditions and on various products will produce various results, only general recommendations can be made as to spinning of coarse and fine yarns. Consequently, the textile manufacturer should take all factors into consideration before attempting to decide what definite relative humidity is best for spinning a specific yarn.

COTTON FIBRE DIAMETER MEASUREMENTS

The following is a summary of a pamphlet entitled "The Determination of the Swollen Diameter of Cotton Fibres—Effect of Size of Sample on the Significance and Reliability of the Results." The pamphlet has been written by R. S. Koshul, M.Sc., and Dr. N. Ahmad, O.B.E., and published by the Indian Central Cotton Committee Technological Laboratory, Bombay.

Swollen diameter, as a measurable character of the cotton fibre was first suggested by Calvert and Harland in 1924. In 1925 Calvert and Summers investigated the changes which take place in a cotton hair during mercerisation without tension. They also studied in detail the changes in ribbon width of an Indian cotton (Punjab-American) irrigated with solutions of sodium hydroxide of varying concentrations ranging from 2.5 to 36.7%. Their work indicated that no additional change in ribbon width is obtained by raising the concentration of sodium hydroxide beyond 15.8%. Consequently in the experiments discussed in this paper, a concentration of 18% has been used throughout for all cottons. In 1934, Peirce and Lord, from a study of thirty-two cottons of widely different degrees of fibre maturity and fibre weight, showed that swollen diameter is an excellent measure of intrinsic fineness, and in this respect it is far superior to ribbon width.

Swollen diameter has recently come into prominence as a measurable character of the cotton fibre, on account of its relationship on the one hand with the intrinsic fineness of cotton and on the other with its spinning performance. For its accurate measurement, however, it is essential to

determine the influence of the size of the sample on the significance and reliability of a satisfactory sample, because, like other properties of the cotton fibre, the swollen diameter shows a fairly large degree of variability. An investigation was therefore undertaken to determine the number of tests which may be regarded as satisfactory for the determination of this property. The following formula has been used for this purpose :—

$$N = \frac{m^2 \sigma^2}{x^2}$$

where N is the number of tests, x is the desired accuracy expressed as percentage of the mean, σ percentage standard deviation, and m the factor for obtaining specific odds. In the present investigation a large number of cottons were tested but only 100 tests were made on each cotton ; the value of σ was calculated from the residual variance obtained after eliminating the effect of varieties by the analysis of variance. Fisher's g_1 and g_2 were used to test the normality of the frequency distribution of swollen diameter for each cotton.

For the determination of swollen diameter, a maturity slide was prepared in the manner described in an earlier bulletin ; the fibres were spread out and carefully separated by means of a blunt needle. They were irrigated with 18% caustic soda solution, and one reading near the middle of each fibre was taken on a micrometer scale in the eye piece of a microscope. As a result of this investigation, we recommend the following procedure for the accurate determination of this property.

(1) Swollen diameter measurement (as described in this paper) should be carried out by two testers.

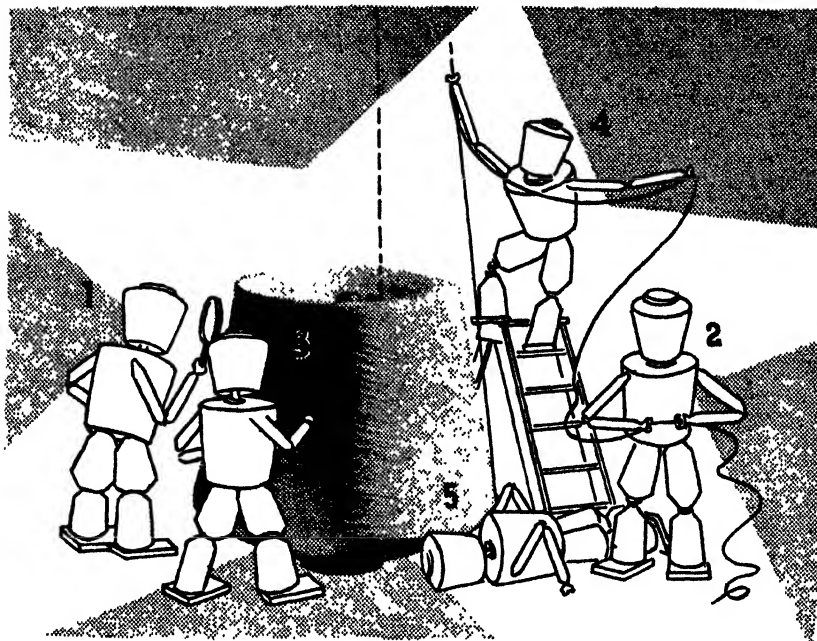
(2) Each tester should prepare a " maturity slide " and take swollen diameter measurements on 75 fibres for cottons in general and on 100 fibres for special cottons.

(3) The mean results obtained by the two testers for the same cotton should not vary by more than 6% for special cottons and 7% for other cottons. If larger differences occur, tests should be repeated by one or both testers.

(4) The extreme variation for ($P=0.05$) which may be expected between two cottons due to random causes is about 5% for mean values based on 150 tests, and about 4% for those based on 200 tests. If larger differences are observed, these may be due to the " specific treatment effects."

AN AUTOMATIC REACHING-IN MACHINE

Attention has been given recently in the cotton trade press of Lancashire to an automatic reaching-in device designed by Messrs. Moore & Avery Ltd., of Blackburn, who have for many years specialised in the manufacture of reaching-in machines, of which large numbers are in work. These machines operate chiefly from a " combed " warp, that is, a warp in which the ends are kept in regular parallel formation by means of a comb. To meet current trends, particularly in respect of the develop-



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74 mills are winding cotton yarns on the new Leesona (Regd. T.M.) Roto-Coner, and ROTO-CONES, the product of this winder, are being used by a large number of knitters.

Many of the advantages of the Roto-Cone are due to the patented rotating traverse guide on the winder, a combination driving drum and traverse guide which has been called "the greatest advancement in the winding art in the past 50 or 60 years."

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A free bulletin explains the five opportunities Roto-Cones give to improve quality and increase production through more satisfactory delivery on knitting machines.

ROTO-CONES for better knitting

ROTO-CONES for better winding

UNIVERSAL WINDING COMPANY
BOSTON PARIS MANCHESTER

LEESONA

ments in rayon weaving, the firm have added to their range of machines a model to operate from an end-and-end leased warp.

The machine provides full equipment for the drawing-in operation. The beam is mounted on an adjustable stand placed near the floor to prevent any necessity for the provision of beam lifting tackle. From the beam the warp is passed vertically upwards between two parallel rails on which the reaching-in unit travels as the warp is drawn in. The warp is held in position in full width by means of a pair of suitable clamps which are so adjusted on the machine frame that the cross of the end-and-end lease is held at the level of the end selectors of the reaching-in unit.

In front of the machine stand are the harness and reed stands. The position of the harness is adjustable so that the mail eyes of the healds can be brought opposite the warp ends and the harness frame can be moved laterally as required according as the beam is wider or narrower than the harness.

The reaching-in portion of the machine is a compact self-contained unit equipped with an electrical motor of $\frac{1}{30}$ th h.p. This can be driven from lighting supply current and consumes no more power than an ordinary electric lamp. The assembly plate of the unit is fitted with suitable wheels to travel along the supporting rails of the frame stand. Briefly, the reaching-in unit consists of end selectors, end-reaching and end-presenting elements, an electric motor and automatic controls.

After warp and harness have been placed in position in the stands, the reaching-in unit is placed on the transverse rails at the left of the warp (viewed by the drawer). Connection is made to a convenient lamp socket and the motor is switched on, when the unit commences to move forward towards the warp until contact of the warp with the end-selectors is established. From the lease cross the selectors separate the warp ends in regular order end-by-end. In the construction of the end-selectors no needles are used, but they are so designed that the ends are selected from the lease without any liability for damage to occur to the delicate filaments of rayon yarns.

As an end is separated from the warp it is placed in the tongue of the reaching-in element. This carries it forward into the path of a toothed wheel which carries the end into position nearest the drawer. Immediately the five ends are withdrawn from the warp and carried into position in the teeth of the end-presenting wheel, the motor is automatically stopped.

The ends are now ready for the drawer to engage with his hook. When the first end is removed the motor automatically switches on, and another end is brought forward. Thus the machine maintains a constant supply of ends in the ready position. Should the drawer use a double-bladed hook then two ends are brought forward to replenish the supply of ends in the teeth of the end-presenting wheel. If the drawer inadvertently engages an end in its wrong order, that is, draws in the second end before the first, no replenishment is made and the attention of the drawer is called to his mistake. The replenishment of ends is made far more quickly than the speediest drawer can remove them. During the operation the whole reaching-in unit is being automatically propelled

forward to maintain the end-selectors in exact contact with the warp cross.

The automatic operation of the machine enables the drawer to concentrate all his attention on his work, and he is not subject to irritating interruptions or waits such as occur with juvenile reaching-in. Every detail of the requirements of drawing-in has been catered for in this machine and extreme care taken to assist the drawer to carry out his job efficiently. For instance, the provision of a convenient socket on the reaching-in unit enables a lamp to illuminate clearly the ends ready for the hook.

The sales agency of Moore & Avery's reaching-in machines for the British Isles has been taken over by Unisel Limited, 60 York Street, C.-on-M., Manchester 1.

FIBRE STRENGTH TESTING

By S. S. SUKTHANKER, L.T.C. (Hons.), N. AHMAD, O.B.E., Ph.D., F.Inst.P.
and H. NAVKAL, M.Sc.

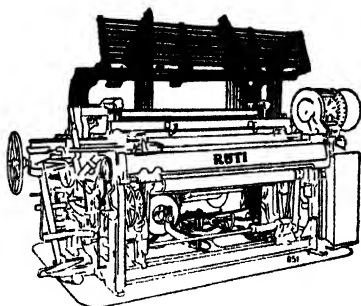
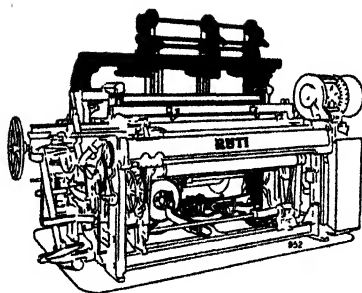
*(Indian Central Cotton Committee Technological Laboratory,
Matunga, Bombay)*

A Technological Bulletin (Series B, No. 26) recently issued by the above organisation gives an account of an apparatus designed by the authors for measuring the strength of textile fibres. A fibre is suspended from a hook fixed to a lever arrangement in which an electric circuit is completed as soon as the fibre is straightened out. The other end of the fibre is attached to a float suspended in a solution of calcium chloride contained in a U-tube. The tension on the fibre is applied by raising a counterpoise suspended from a string in the second arm of the U-tube. As this counterpoise is gradually raised the level of the liquid surrounding the float falls and the pull on the fibre increases steadily until it breaks when the float which had hitherto been held by the fibre drops in the U-tube. The counterpoise is raised by winding the string on a pulley, which is driven by a gear arrangement from a small electric motor. The same gear records the tension applied to the fibre on two calibrated dials, in units and hundreds. The arrangement for applying and recording the tension is connected to the electric circuit referred to above and works only so long as the circuit is complete. As soon as the fibre breaks, the electric circuit is interrupted and both the pointer and the counterpoise come to rest.

The mean values obtained with this apparatus for cottons are given along with those obtained by the Magazine Hair Tester. It is found that the agreement between the two sets of values is good. In addition to being accurate, this apparatus is quick in action, while the costs of construction and maintenance are quite low.

The lower and upper quartiles, the co-efficients of variation and the values of skewness calculated for the data obtained with these two instruments are also compared.

All the above-mentioned points are described in detail in this bulletin



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for the benefit of those who, wishing to determine the breaking strength of textile fibres, may desire to construct a reliable and handy instrument.

SHUTTLE-KISSING VERSUS HAND THREADING

Under the English Factories Act, shuttle-kissing will before long be abolished. There are all sorts of reasons, however, why a wholesale change-over cannot be made immediately, one being the cost of scrapping those shuttles which involve "kissing." One estimate is that the change-over will take six years.

Clearly, the change will be so gradual as to be scarcely noticeable, and, in fact, hand-threaded types of shuttles are already being used more widely. Kirk & Co. Ltd., the Blackburn firm of shuttle bobbin makers, so long ago as 1911 produced at their works a hand-threaded shuttle which became very popular in Holland, Finland, Sweden, Brazil, India, America, and Russia, and to a certain extent in this country.

Mill managers and overlookers in Lancashire have not looked with favour on the hand-threaded types, one objection being that they did not release the yarn at the same tension as ordinary shuttles. That has been met by fixing into the shuttle a piece of sheepskin or fur through which the thread, even of silk and rayon, can pass smoothly, or by a patented device such as that now being made by Kirk & Co.

Kirk & Co. state that for some time they have been meeting a steadily increasing demand for hand-threaded shuttles. There are many different patterns, and to suit the requirements of different mills innumerable variations in length, width, weight, and the like. The firm are turning out well over 4,000 of various designs each week—a surprising thing when you consider that the average life of a shuttle is two years, during which it travels about 35,000 miles and hits the picker 40,000,000 times.

Shuttles are made of cornelwood, persimmonwood and boxwood, the first being the most suitable (and, curiously enough, both the first mentioned grow near the cotton belt in the Mississippi Valley).

(Manchester Guardian Commercial)

HIGH DRAFT SPINNING

The J. & H. Highdraft Ltd., of Spotland Bridge Works, Rochdale, claim for a new patent taken out by this firm that improvements in control of the drafting system itself and in the method of cleaning and maintaining quality have been achieved by using a double apron removable top system of high drafting.

Their patented double apron removable top system has a middle top roller carrying the top aprons which can be removed for cleaning as easily as an ordinary three-line top roller, and can be just as easily replaced, while the bottom apron continues to revolve without dismantling. The nip of the apron can be easily increased or decreased by the insertion of a single tension bar according to the type of cotton used. The weighting arrangements are by the ordinary existing sash bar weight and a quick release front weight hook which weights front and middle lines.

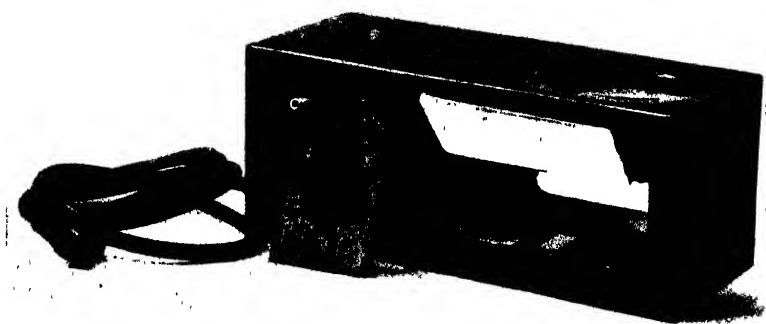
In addition to the ordinary front top clearer, a light top apron clearer is used to keep the top apron clear of laps and fly. Both top clearers run in bearings formed by the front weight hooks, and dispense with the troublesome top clearer brackets.

The firm state that their system is the easiest and most simple of all double apron systems to keep clean, and that the spinning is such that an average girl has a very comfortable time minding. The accessibility is so simple that it is only necessary for the operative to pull the front weight hook forward without unhooking from the top front roller, and the weighting pressure is removed from the middle top roller and aprons. The latter with the middle roller can then be lifted out for cleaning, while at the same time the bottom aprons are also exposed for cleaning though continuing to run.

(Manchester Guardian Commercial)

THE RECTIFINDER

An instrument for the purpose of detecting and examining faults in textile raw materials, yarns and fabrics has recently been brought to the notice of the trade through the medium of Messrs. R. Leech Ltd., 50 Barrington Road, Altrincham, Cheshire, the sole manufacturers. During the last few months, exhaustive trials of the "Rectifinder" in many sections of the textile industry have proved that the claims of the manufacturers of this instrument for examining textile materials and fabrics from the grey cloth to the finishing and making-up processes have been fully substantiated. Its use and adaptability promotes a fuller



knowledge of the materials in process of work, and standardises goods which are being produced to a specification more quickly and economically than some of the more advanced methods of testing in the laboratory.

The "Rectifinder" itself is really an accurately produced scientific instrument, yet can be handled even by a junior operative. The instrument has been made available in two forms. First, as a portable electric dry battery model; secondly as a mains model. In the first model the

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cells are enclosed in an end cabinet making the whole portable and eminently suitable for carrying round the weaving shed or factory, to do the examination or inspection in a minimum of time on the spot, and know with certainty whether a fabric, even when weaving down the loom, is perfect or faulty. No focusing is required, for on switching on the electric light the lenses and the whole field of yarn or fabric being inspected become illuminated adequately for the minutest inspection. Any degree of magnification desirable can be obtained, but actually in practice it has been found that up to about 10 times gives better results for the general inspection desired than the higher degree of magnification obtained by using a microscope, yet losing the field being observed. The "Rectifinder" carries its own special daylight lamp, which ensures proper colour values in fancy and striped fabrics, and in examining dyed or mixture yarns.

THE MAINS "RECTIFINDER"

The original battery model proved so successful inside weaving sheds, that immediately a demand developed for a "Rectifinder" for permanent office and warehouse use, which could be a fixture if necessary or moved about and tap current at the place of inspection from the electric light mains. In yarn spinning mills, especially on folded and coloured work, in woollen and worsted, cotton, silk, rayon and "Fibro" weaving sheds, the "Rectifinder" has achieved success. The device is stated to have proved excellent in textile factories for isolating the causes of faults that occur in the grey cloth, or those due to mechanical, chemical, and manufacturing processes in yarns and fabrics.

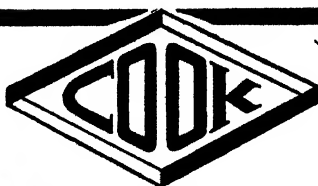
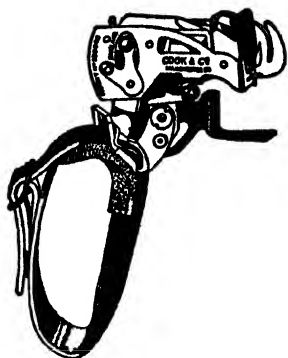
The instrument can be supplied for any electric current in the Mains Model, whilst for the Battery Model the replacement batteries are standard and can be obtained in most countries.

SOME GOOD USES OF THE APPARATUS

Cotton spinners are using it to inspect card webs for neps and impurities, also for testing rovings, and yarn, by inspection for snarls, twist, thick places, counts, and spinning variations. Wool and real silk fibres can be inspected for "lousiness," and natural defects, while in rayon fluffiness, extraneous solids, and chemical faults become visible.

The great field of application of the "Rectifinder," however, is in the weaving shed, and for fabric examination, the primary purpose for which it was invented. Faults in weft, in warp, weaving faults of design, floats, in the fabric repeat, selvedge faults, flaws in pile on terry and velvet weaving, of striping, barry, tight and slack picks, and reed marks, are but a few of the errors immediately shown up under the lens of the "Rectifinder." "Shiners" and stopping places, always a bad fault and injurious in silk and rayon weaving, can be found easily.

The "Rectifinder" it is claimed is already used by the largest textile concerns, cotton, silk and rayon in the chief textile countries of the world, and also by a good many universities, technical colleges and schools etc. in Great Britain and many overseas countries. The instrument, which is fully provisionally protected, is practically everlasting.

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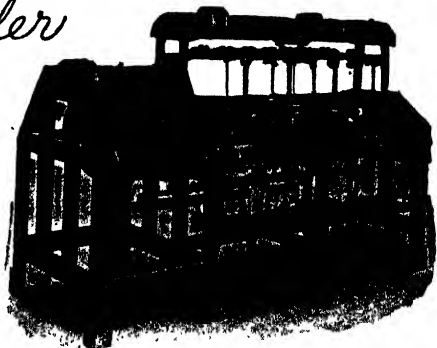
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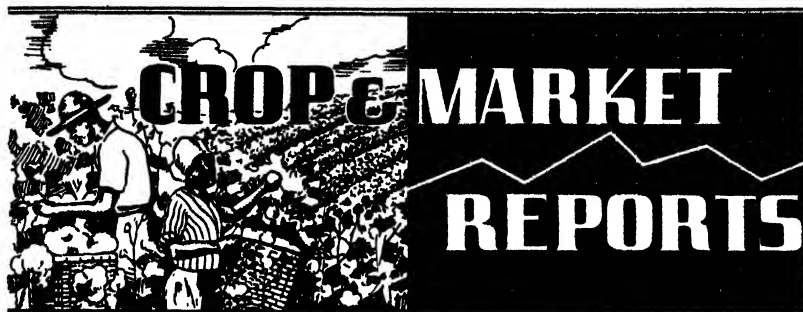
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AMERICAN

Messrs. Geo. H. McFadden, Memphis (Tenn.), write as follows in the Crop Letter dated July 11, 1939, covering the previous week.

Resume: The weather was generally favourable. Showers to moderately heavy rains were confined mostly to the eastern half of the Belt and, except in a few areas which did not need the rain, the moisture was not detrimental to the crop, although the precipitation in the south-east tended to encourage insect activity. Extremely high temperatures and hot winds in portions of Texas were somewhat unfavourable, temperatures over the Belt averaged well above normal.

While rain would be beneficial in some portions of the west, the Belt generally needs another week of clear warm weather.

The crop is well cultivated and a good improvement was reported in the Central States although there are still some grassy fields in this area. Complaints of only a fair taproot were received in the Central States, but generally a good root has developed in other sections.

Stands are mostly good in the east, fair in the Central Belt with considerable irregularity, and mostly good in the west except in the north-west where they are only fair. Plants are inclined to be sappy in some sections of the Central Belt and while there were some local complaints of wilting and dying in Texas, generally plants are in healthy condition.

Cotton is blooming freely over most of the southern half of the Belt and becoming general in the more northerly sections. Fruiting is mostly satisfactory with only a few local complaints of excessive shedding.

Although weevil damage is light, infestation ranges from moderate to heavy in the eastern half of the Belt and averages more than at this time last year. In the western half weevil infestation appears to be much lighter than last season. A considerable amount of poisoning is being done in the heavily infested areas. Reports of other insects are mostly local and comparatively insignificant.

Although only fair progress was made in some portions of Texas, generally satisfactory progress was made in most sections of the Belt and averaged better than for several weeks past. Harvesting is making good progress in South Texas.

Weil Brothers, Montgomery, Ala., in their semi-monthly Crop Letter dated July 3, 1939, state: Below we give reports from our various correspondents, by states. They denote, generally speaking, a spotted condition of the crop in general. The only bright spots in the prospects are North and South Carolina, Texas and Oklahoma. The balance of the Belt is rather uncertain as to the final yield and is, on the average, we may say, ten to fifteen days late as to the crop movement. Where excessive rains were had the plant is sappy and long jointed. We need continued dry weather interspersed with few rains. With the critical stages before us, namely, the months of July and August, the crop must bear constant watching.

North and South Carolina: Weather favourable; some sections better than last year; plant squaring rapidly; little blooming except in southern South Carolina where blooms are plentiful; some weevil infestation, but crop prospects good. Movement expected middle of September, except in the southern portions where the crop is advanced.

Georgia and Alabama : Too much rain ; plant in sappy condition ; 40 per cent. grassy ; larger farmers hiring extra labour to weed out ; the plant taking on good growth but rains causing considerable shedding ; squaring and 50 per cent. blooming ; prospects about 80 per cent. of last year ; estimated movement two weeks late—depends upon weather hereafter.

Mississippi and Louisiana : Weather more favourable since June 15 ; rains less frequent ; dry weather and hard work has helped ; no bottom crop ; plant sappy ; need almost perfect weather to make a fair crop. Some drowned out low places being abandoned.

Arkansas and West Tennessee : Too much rain, exceedingly spotted ; owing to rainy conditions, plants all sizes in the same fields ; prospects not promising ; tap root lacking and plant sappy. Consequently we should look for trouble if we have a hot, dry July ; expect movement about September 10.

Texas : In the main, generally speaking, Texas had too much rain in all sections excepting the north-west ; considerable replanting was necessary in some sections. It is estimated 80 per cent. of the crop is good, and south, central and extreme west only fair ; 20 per cent. is undersized for this time of the year ; plant squaring and blooming—all except West Texas. Weevil damage insignificant up to date ; crop ten days to two weeks late.

In the Corpus Christi section the crop improvement is very marked the past two weeks—much better than last year ; practically all blooming ; crop clean and movement expected the latter part of July.

Oklahoma : Weather good ; crop made good progress ; squares are plentiful and a few blooms reported. The crop is equally as good or better than last year.

The *American Cotton Crop Service*, Madison (Fla.), writing under date July 12, state :—

High temperatures during the last half of the week over the western half of the Belt caught the immature stages of the first weevil generation just in time to promote exceptionally heavy mortality and probably eliminate the weevil damage threat over a large area. At the moment the main weevil-threat area consists of the southern halves of Louisiana, Mississippi, Alabama and Georgia. The most important features of the present outlook may be summarised as follows :—

1. The present bottom crop in the southern half of the Central and Eastern Belts is not as good as usual due to the fact that March, April and May weather conditions were unseasonably cold. During the last half of May hot weather and excessive showers arrived and the plant made stalk growth at the expense of fruiting. This statement does not include extreme South Texas, where the crop in the Rio Grande Valley northward to Neuces County is better than usual.

2. By August 1 the crop in the southern half of the Belt is usually "made" and safe from weevil damage, that is, bottom and middle crops. This year the crop is later than usual and middle crop cotton will not be as far advanced by August 1 as usual.

3. Yield possibilities depend on future weather conditions. Moisture, except a few localities in the extreme western half of Texas, is ample. However, insect pests could become a limiting factor should a long, showery weather condition develop.

MISSISSIPPI WEEVIL SITUATION.—We call attention to the weevil situation in the southern half of Mississippi as reported last week by the Mississippi State Plant Board. Infestation reported was so high we reproduce the report as follows : "Boll weevils were generally distributed throughout the State according to reports of Plant Board Inspectors and Government Entomologists who examined 49 farms in 10 counties during the past week, finding weevils on all of them except one farm in Washington County. The average infestation was 21%, as compared with 22% last week, 13% on this date last year, and 6% in 1937.

"New generation weevils are emerging and unless the weather turns hot and dry, the infestation will rise rapidly."

The *American Cotton Crop Service*, Madison, Florida, U.S.A., in a Crop Report Cable dated Wednesday, July 26, to their European subscribers states that :— "Condition made average gain past week, mostly good crop of bolls already safe, southern half of Belt preliminary returns from crop reporters point to a yield probably in excess of four year average."

Mr. W. M. Garrard reviews the crop situation in the Mississippi Delta in the *Staple Cotton Review* for June as follows :—

In the June issue of the Review for last year this report began as follows :— "Crop conditions have been anything but satisfactory up to this time." This

would certainly cover the situation for the present crop. However, the condition has been brought about by an altogether different set of circumstances this season. A year ago it was dry weather which was responsible ; this year it has been too much rain, and of the two evils the former is preferable as the chances for overcoming the hazard are decidedly in favour of the dry season.

The cotton crop in the Louisiana Delta is spotted and off to a late start. The acreage of a large part of the lower Mississippi Delta has been in bad shape, and while only a small part has been entirely lost, stands have been broken and growth retarded. The upper Mississippi Delta and Arkansas are off to a better start. Even this area has had too much rain, and while stands are good and crops as a whole clean, the plant is sappy and growing too fast.

Messrs. Reynolds & Gibson, Liverpool, on July 26 last, wrote :—

The announcement of the United States export subsidy on cotton was made over the week-end and, as it was very much in line with general expectations, prices show some improvement on balance, having made good recovery after an initial decline. The subsidy is to be a fixed one, at the rate of $1\frac{1}{2}$ cents per lb. on exports of new crop cotton and applies from July 27, 1939, to June 30, 1940, but the right is reserved to the Secretary of Agriculture to vary the subsidy either upwards or downwards, if such a change is regarded as essential to the success of the programme. Existing Loan stocks are not eligible for the export subsidy at present, the desire of the Administration evidently being to stimulate exports of new crop so that access will have to be made to the surplus Loan stocks by domestic consumers to fill their requirements, presumably at the release price which would be over 9 cents.

The immediate effect here was a very noticeable increase in hedge selling in this market as U.S. shippers have started to fix their forward contracts, which caused a moderate decline in Liverpool. On the other hand, in America, prices have advanced sharply as increased demand from foreign sources and a strong buying movement have developed following the improvement in Wall Street. This, in turn, has brought some recovery in our market, though not to the full extent, and the straddle has narrowed considerably to below a true importing parity.

The object of the American Government's plan is to increase exports of American cotton to this and other markets and, if this is successful, it follows that, as the crop movement develops, increased selling of American should be felt here. At the same time, there is still much distrust in the situation on the part of buyers, to some extent owing to the general political situation, but more particularly owing to the reserved right to vary the subsidy if considered necessary. It now remains to be seen to what extent the subsidy will be effective and the most important feature is the "basis" at which new crop offers will be made. As things are at present, cotton can only be bought on hand-to-mouth lines, to fill spinners' urgent requirements, the "basis" being too high to warrant merchants importing into stock, and it will only be through some considerable easing in the basis of c.i.f. offers that American cotton will again accumulate in Liverpool (local stocks of American being now reduced to about 200,000 bales as compared to some 750,000 a year ago). Whether this will occur depends very much on the size of the new crop and, consequently, the weight of selling pressure in the United States itself, which cannot be seen for some weeks yet, for as long as Liverpool continues to rule at below a true importing parity with New York, cheaper basis is unlikely unless spot prices in the South decline materially relative to futures. Unfortunately, the proviso that the subsidy may be varied destroys confidence and deters buying in this market which would otherwise develop on the unduly narrow straddle, and so we have the vicious circle which always seems to be the outcome of American Government legislation.

Crop progress is now becoming a very important factor in the situation, much more so than last year when an extra million bales or so merely meant that the Government took them at the loan price. It is the aim to increase exports to 6 million bales, which would leave less than required for U.S.A. domestic consumption if the crop should turn out only $11\frac{1}{2}$ million bales or less ; whereas, if it is over 12 million bales supply would be about normal. The prices of futures and spots in the United States depend very much, therefore, on how much the crop will vary around about $11\frac{1}{2}$ million bales. Weather conditions have been definitely favourable during July, and warm weather and light rains over the bulk of the Belt have put the plant into healthier shape, to withstand any drought which might occur later.

Business in our own market has been more active since the subsidy announce-

ment, hedge selling having increased and professional operators having taken a more active interest in the market. The initial effect was for the nearer months to weaken further as compared to the more distant positions under a considerable amount of selling of October by prominent American spot interests, with the result that that month went almost level with next July. This afternoon, however, some buying of October, apparently on straddle account, was responsible for a general covering movement in that month, causing it to appreciate rapidly about 15 points relatively over the forward positions. As long as the Southern basis remains firm, there is not much chance of the spot situation here becoming relieved and, therefore, the tendency may be for the nearer months to remain firm, though we doubt whether the present premium of October will be maintained later on when the movement of the crop is accelerated. As we have stressed above, it is difficult as yet to foresee cheaper basis offers to this market but it must not be forgotten that the U.S. Administration has the definite aim of materially increasing its exports.

EGYPTIAN

The Report of the *Commission de la Bourse de Minet-El-Bassal* for the month of June reads as follows :—

LOWER EGYPT.—Thanks to the favourable weather conditions which prevailed during June, the plants have made rapid progress. They are in good condition, healthy and vigorous, and their development is about ten days in advance of last year. In the early plantations they are flowering.

The area planted in Giza 12 has been considerably increased at the expense of other varieties, excepting Giza 7, the acreage under which is slightly larger than last year. The area planted in Fouadi is negligible.

Leaf worm egg masses have appeared everywhere, but to a less extent than last year. Thanks to the energetic measures taken by the Government and the farmers they have in general been destroyed by picking before the eggs have hatched, with the result that the damage has been of little significance.

Attacks of "Wilt" have been reported in some fields planted with Sakellaridis, Giza 26 and Giza 7, but on the whole the damage has been very small.

Water for irrigation has been adequate.

UPPER EGYPT AND FAYOUM.—Weather conditions during June were favourable for the plants, which are in good condition.

Leaf worm egg masses have appeared. There have been some sporadic cases of hatching, but propagation has been prevented by early picking of the affected leaves. No damage is reported from this or other insects or maladies.

The plants present a healthy appearance and are eight to ten days in advance of last year.

The area planted is 5 to 10 per cent. smaller than last year.

Water for irrigation has been adequate.

Alexandria, July 6, 1939.

Messrs. Reinhart & Co., Alexandria, write as follows in their Market Report under date July 14 :—

FUTURES MARKET.—The decline of the non-American markets during the week under review in presence of a rising trend in New York is a reaction to the ongoing studies in Washington for an early application of the export subsidy.

Here, the trade was a regular buyer on the scale down especially for Ashmouni futures. Hedge-selling occurred in Giza 7 and Sakellaridis and depressed particularly the July options, holders of such contracts wishing to avoid tenders. On the second notice-day for July delivery Crs. 1,000 Giza 7 and Crs. 500 Sakellaridis were tendered.

The SPOT MARKET was fairly active. The principal demand is still for *Uppers*, of which 3,300 bales changed hands, but premiums remained unchanged, thanks to a sufficient supply. The turnover of *Giza 7* ranks second in importance with 2,000 bales. High grades are getting scarce. The sales of *Zagora* were moderate only with 600 bales, of which one deal of 400 bales. Present premiums are slightly easier than last week but still rather expensive on account of the very restricted supply. A regular demand has been noticed for the high grades of *Sakellaridis*.

NEW CROP.—*Upper Egypt.* The crop makes good progress, but it is to be borne in mind, that in former years there were heat-waves in July and August which caused havoc to the crop.

Lower Egypt. The weather was favourable for the development of the crop, and the plants are well developed except in some districts in the extreme north of the Delta, where they have suffered from damp weather.

The Alexandria Commercial Co. forward the following remarks in their weekly report dated July 14 :—

UPPERS.—The somewhat better tendency reported in our last was not maintained due mainly to the uncertainty of the political situation and the conflicting rumours about the American subsidy. According to the news received from America the subsidy tax should be between $1\frac{1}{4}$ and $1\frac{1}{2}$ cents in accordance with commercial conditions and with the proviso that Washington has the option of increasing the subsidy in the event of their finding that exportation of cotton has not been sufficiently encouraged. Naturally all these unofficial announcements do not tend to encourage the market and the liquidation of long fixations in new crop have resulted.

The estimation of the acreage published by the U.S.A. of 24,943,000 acres, against 25,018,000 acres at the same time last year was also slightly bearish.

In this market trading was very restricted both from the commercial and speculative point of view. Spinners demand was very limited both for new and old crop. There was little fixing from up-country and speculation was too uncertain as to the American subsidy to operate with confidence.

Taking into consideration the statistical position in Egypt we do not think that a considerable drop in prices can be foreshadowed, on the other hand with the incertitude with regard to the American subsidy and the unsettled political situation in Europe it is difficult to forecast any improvement.

GIZA 7.—The same conditions have reacted on this market as for Uppers. The weakness of the near months is due to the rules actually in force regarding a limitation of operations of jobbers and the liquidations of positions held by the small export houses.

Spinners did not show much enthusiasm and speculation was not interested with a resultant narrow market sensible to every operation.

SAKEL.—The July position in this variety was governed by the same factors as those for Giza but was more pronounced as the market was so much narrower. The difference between old and new crop registered as much as 150 points at one period. The question of a revision of the existing regulations is being considered to obviate such an anomaly.

CROP 1939.—The reports received during the week are everywhere favourable. In Upper Egypt the plants are progressing well and compare satisfactorily with last year.

In the Delta the crop is quite normal and with exception of a few districts in the North the leaf worm attack is being held well in check.

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MISCELLANEOUS

AN EXHIBITION OF NEW TEXTILE FIBRES

In laboratories all over the world research chemists are constantly engaged in the study of fibres and the last few years have brought to light many discoveries and developments of importance to the textile industry. A special exhibition of these has been arranged in the Demonstration Room on the Ground Floor of the Science Museum, South Kensington, London, S.W.7, and will be open to the public from July 3 till August 31, 1939. For the most part, this collection of modern fibres and fabrics comprises a representative selection from the exhibition prepared in conjunction with the recent Textile Institute Conference held at Bath, and many of the examples have been sent by the Institute for public exhibition at the Museum.

Today fibres possessing many of the properties of natural wool are manufactured from skimmed milk. Cut into short lengths, these may be used either as a substitute, or, as is more often the case, for mixing with the natural fibre. The exhibit illustrating the stages in the manufacture of casein yarn includes several examples of fabrics, woven on worsted machinery.

Another group of exhibits includes yarns and materials as produced by the viscose and cellulose acetate methods. These are generally termed rayon or "artificial silk." By modification of the spinning processes it is now possible to manufacture exceptionally strong yarns of this material, and some of the applications are illustrated by such articles as a section of a motor tyre showing the cord reinforcement, "doped" aeroplane fabric, fine gauge hose, sail cloth, etc.

An interesting American exhibit shows a new type of cellulose acetate rayon in which the fibre is characterised by an inherent stabilised crimp, producing a yarn whose behaviour is comparable in some respects to that of wool.

One of the most important textile discoveries of recent times has been that of nylon. This is a truly synthetic yarn and is the first textile fibre prepared wholly of raw materials from the mineral kingdom. Although derived from coal, air and water, nylon can be produced in filaments of exceptional strength or as fine as a spider's web, yet having elasticity and lustre.

Another striking development is to be found in the use of glass fibres. It is on record that an apron made of glass fabric was produced at the time of Queen Victoria's coronation, but it has only been within the last five years that satisfactory progress has been achieved in the production of glass fibres of the requisite uniform fineness. Objects showing this

class of fibre include woven and knitted fabrics made entirely of pure glass with a collection of articles indicating the commercial applications.

An exhibit of interest from Tokyo shows fibre and yarn produced from seaweed. In some respects the fibres resemble raw silk but differ from rayon. They are the result of a recent Japanese patented process.

Jute, sisal, and hemp are each represented, with examples of the latest types of yarns and materials produced from these fibres.

It is not generally realised that many fabrics contain mixtures of various yarns and it is interesting to note the uses for the new fibres in the comprehensive selection of up-to-date fabrics.

The Science Museum is open free to the public on weekdays from 10 a.m. to 6 p.m. and on Sundays from 2-30 to 6 p.m. On Bank Holidays from 10 a.m. to 6 p.m.

RESTRICTIONS UPON THE PRODUCTION OF SYNTHETIC COTTON IN BRAZIL

According to a decree promulgated in Brazil on April 3 last, the installation of new machinery for the purpose of producing commercially synthetic materials to substitute agricultural and animal commodities such as wool, rubber, silk, and cotton is prohibited.

The text of the decree runs as follows :—

The President of the Republic, by virtue of authority granted him under Art. 180 of the Federal Constitution, and

Considering that Brazil is a large producer of raw materials that it requires to export and to industrialise within the country ;

Considering that it is the duty of the Government to protect mainly the basic products of the agricultural and cattle raising industries ;

Considering that there are industries devoted to the manufacture by artificial and chemical means of products intended to substitute those of agricultural and animal origin ;

Considering that these industries are justified in countries lacking in raw materials, but are not justified in Brazil, where wool, rubber, cotton and other products exist in large quantities ;

Considering that this industry of substitutes is prejudicial to the production and the consumption of our main raw materials, unbalancing the economic situation of the country ;

DECREES :—

Art. 1. That it will not be permitted to install new machines destined to produce industrially synthetic materials to substitute agricultural and animal commodities such as wool, rubber, silk, cotton and others, at the discretion of the Government.

Art. 2. Industrial concerns coming under the above clause and already functioning shall not raise the selling prices of their products without first receiving the sanction of the Government.

Art. 3. All laws to the contrary are hereby revoked.

TEXTILE INSTITUTE ANNUAL CONFERENCE

The Annual Conference of the Textile Institute was held at Bath from May 30 to June 3.

The theme of discussion was "New Fibres—Their Production, Properties and Utilisation." Papers delivered were "Teca—Its Properties and Utilisation," by Dr. H. De Witt Smith; "Glass Fibre Textiles," by A. Lindsey Forster; "New Synthetic Fibres in the Dyeing and Cleaning Industry," by R. B. Brown and Miss S. Brown; "The Dyeing Properties of New Fibres," by H. M. Bunbury; "Rayolanda X" and "Rayolanda WA"—New Fibres of Value in Textile Design by Reason of their Special Dyeing and Textile Properties," by Dr. H. A. Thomas; "Tenasco," by L. Rose; "Casein Fibre," by G. Hein; "The Manufacture and Properties of Casein Fibre," by C. Diamond and Dr. R. L. Wormell; "Completely Non-Felting Wool and its Use in Textile Materials," by A. J. Hall.

The Mather Lecture, "Polymerisation and its Bearings on the Production of New Synthetic Fibres and Finishes for Textile Fibres," was delivered by Professor E. L. Hirst, F.R.S.

NEW PRESIDENT, BREMER BAUMWOLLBOERSE

At the General Meeting of the Bremer Baumwollbörse held on May 20, 1939, Mr. H. Westerschulte, of the firm of Deutsch-Amerikanische Baumwolle-Import Gesellschaft Westerschulte, Wegener & Co., was appointed President, and Mr. Julius Koch, of H. Bischoff & Co. and Mr. H. Addix, of Addix & Cordes, first and second Vice-Presidents respectively.

AMERICAN SOCIETY FOR TESTING MATERIALS

A report recently issued by the above society's committee on textile materials summarises briefly the extensive activities of the committee during the year. It announces the formation of a subcommittee on glass textiles and the initiation of a research programme on the evaluation of textile finishes.

The report includes comprehensive methods of test for rayon staple, new methods of test for single jute yarn, and a procedure for measuring the apparent fluidity of dispersions of cellulose fibres in cuprammonium hydroxides, all of which are recommended for publication as tentative. A critical review by the committee of the standards under its jurisdiction

has resulted in the presentation of recommendations for the adoption as standard of six tentative standards, revisions in three tentative standards, the adoption of tentative revisions in four standards, and the submission of new revisions in four standards.

BELGIAN-EGYPTIAN BARTER ARRANGEMENT

A report from Cairo published in the German press states that an offer has been made by the Belgian Government to exchange railway coaches for Egyptian cotton. This offer is at the moment being examined by the Egyptian Government authorities.

COTTON ROADS AGAIN

Many people in Europe have been known to belittle the attempts of our American friends to establish cotton roads in that country. Several references have been made in this Journal, from time to time, to the various instances where cotton foundation has been put under asphalt roads in the U.S.A., and now news has reached us which demonstrates the practical value of these experiments.

The city engineer of Greenville (Miss.) has inaugurated an extensive programme of cotton road construction which will include fifty city blocks. Incidentally Greenville was the first city to lay down a cotton road eight or nine years ago. The cotton cloth is used to reinforce the layer of asphalt and the work is being done under the Works Progress Administration.

Still another city, namely Dallas (Texas), is laying down another of these streets at a cost of \$3,500 for a length of 9,200 feet. The cost of labour will be \$300, cotton cloth \$1,400, gravel \$1,000 and asphalt \$800.

Obituary

THEODOR FREIHERR VON LIEBIG

It is with sincere regret that we have to announce the death of Baron Theodor von Liebig, the former Chairman of the Allgemeiner Deutscher Textilverband of Reichenberg, Sudetengau, Germany. For a long number of years Baron Liebig had led the textile industry of that part of Europe through times which were fraught with troubles and difficulties, and his high qualities of leadership were an ever present source of inspiration to his colleagues. In his capacity as President of the International Cotton Congress held in Carlsbad in 1933 he endeared himself to the members of the International Cotton Federation, by whom his memory will always be cherished.

We extend our heartfelt sympathy to his relatives in their great sorrow.

Reviews on Current Cotton Literature

"THE EMPIRE COTTON GROWING REVIEW," July 1939. Published for the Empire Cotton Growing Corporation by P. S. King & Son Ltd., 14 Great Smith Street, London, S.W.1. Quarterly. Annual subscription 5/-, post free.

Items of special interest in the current issue of the Review are "The Mycorrhizal Habit in Crop Plants, with a Reference to Cotton," by M. C. Rayner, "Some Comments on Dr. Mason's article 'A Note on the Technique of Cotton Breeding,'" by S. C. Harland, and "A Note on Hosts of the Pink Bollworm, 'Platyedra gossypiella' (Saund.), in the West Indies," by F. A. Squire.

"VISTRA FESTSCHRIFT." Published in German by I.G. Farben-industrie Aktiengesellschaft, Berlin, S.O. 36.

We have received a handsomely produced copy of the above publication which is issued to celebrate the twentieth anniversary of the first production of Vistra and the tenth year of the existence of the Vistra Association; an organisation of spinners of this synthetic fibre and the producing firm.

The publication deals with the difficulties of the German Textile Industry from 1919 to 1939 and shows the development of Vistra from the first years of production to the present year. A historical record of an immense achievement.

The book is beautifully produced and illustrated by photographs and sketches in colour of typical Vistra fabrics.

"THE LANCASHIRE TEXTILE INDUSTRY," 55th Edition, 1939. Published annually by John Worrall Ltd., Oldham, Lancs. Price 15/-, post free. Abroad 17/- net.

Like its long line of predecessors, the current issue of this publication is veritably indispensable to anyone interested in any way in the textile industry of Lancashire.

The book contains full and up-to-date particulars of all cotton, wool, silk, and rayon spinners, manufacturers, bleachers, dyers, finishers, and other branches of the industry using power, and is fully indexed and classified.

Attention is drawn to the extended classifications in this Standard Textile Publication. A new feature is the Cloth Finishing Section and the list of Textile Fabrics has now been enlarged to cover over two hundred different fabrics, so that it may be said to be fairly representative of the whole range of production from Lancashire looms.

"THE BRITISH COTTON TEXTILE INDUSTRY AND DEMAND FOR RAW COTTON." An interesting article on the above subject was contributed to the April, 1939, issue of the U.S. Department of Agriculture publication

Foreign Agriculture by Mr. Arthur W. Palmer, U.S. Agricultural Commissioner in London, in the course of which the writer stated the following:

From the standpoint of British demand for American cotton, there would be less reason for apprehension at the prospect of a higher price level for British-made cotton goods, if, by means of quota protection unencumbered by reciprocal obligations to purchase raw cotton, by allocation of markets through an international cartel, or by the use of a multiple-price plan, the British cotton industry could insure itself against further losses of markets abroad. In fact, experience with yarn margin control suggests that, in so far as it relieves spinners of some of the pressure to cut costs, it removes some of the incentives to use the cheaper substitute growths and so operates to favour the use of American cotton in the production of those types and counts of yarn for which it is technologically suited and for which it is ordinarily preferred.

On the other hand, American cotton has much ground yet to lose if quotas in foreign textile markets are coupled extensively with British commitments to take in return either fixed or proportionate quantities of raw cotton of types that would definitely supplant American in British mills. The extent to which, with the industry unified and mobilised as proposed in the Reorganisation Bill, this method may be employed in the drive for exports remains, therefore, a question of more than passing interest.

BOOKS RECEIVED

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN SWEDEN, APRIL 1939." By the Commercial Secretary to H.M. Legation, Stockholm. Printed and published for the Department of Overseas Trade by H.M. Stationery Office, London, W.C.2. Price 2/- net.

"MEMORIA ANUL DE LA JUNTA NACIONAL DEL ALGODON, 1938." Published by the Junta Nacional del Algodon, Buenos Aires.

"GUIA DA PRODUCAO INDUSTRIAL PORTUGUESA 1939-1940." Published by the Associacao Industrial Portuguesa.

"GIORNALE DEGLI ECONOMISTI E ANNALI DI ECONOMIA." Published by Casa Editrirel Dott. Antonio Milani, Padova.

COTTON TRADE STATISTICS

WORLD RAYON PRODUCTION

The following tables, which have been compiled and published by *Rayon Organon* (New York), show the trend of rayon production (continuous filament yarn and rayon staple fibre) during the last three years. The yarn figures for 1914 are included to illustrate the remarkable development of the industry during the last quarter of a century :—

RAYON YARN AND STAPLE FIBRE (In thousands of lbs.)

				1936	1937	1938	Percentage of World Total in 1938
Argentina	..	..	..	450	1,850	2,700	—
Belgium	..	..	..	14,200	17,160	12,800	0.5
Brazil	..	..	..	4,925	7,250	11,825	0.5
Canada	..	..	..	13,625	16,500	13,700	1
France	..	..	..	66,100	77,700	72,550	4
Austria	..	..	..	1,875	2,200	a	—
Germany	..	..	..	193,435	344,200	471,000	24
Czecho-Slovakia	..	..	..	7,425	10,010	8,010	—
Great Britain	..	..	..	142,970	152,420	138,195	7
Greece	..	..	..	295	520	720	—
Hungary	..	..	..	110	110	110	—
Italy	..	..	..	196,100	262,900	268,310	14
Japan	..	..	..	320,850	508,600	584,600	30
Netherlands	..	..	..	22,050	23,920	19,950	1
Norway	..	..	..	—	340	385	—
Poland	..	..	..	12,900	16,270	22,450	1
Portugal	..	..	..	215	240	400	—
Roumania	..	..	..	650	1,325	1,850	—
Spain	..	..	..	5,925	2,200	1,100	—
Sweden	..	..	..	2,110	2,930	3,830	—
Switzerland	..	..	..	11,000	12,125	12,075	1
U.S.S.R.	..	..	..	13,600	15,400	16,000	1
United States	..	..	..	289,940	341,925	287,485	15
World Total	..	..	..	1,320,750	1,818,075	1,948,045	100

TOTAL WORLD RAYON YARN PRODUCTION BY PROCESS

In per cent.						In millions of lbs.							
	V	C	N	A	Total		V	C	N	A	Total		
1930	..	88	3	2	7	100	1930	..	397	15	9	30	451
1931	..	89	3	1	7	100	1931	..	444	13	6	37	500
1932	..	88	2	1	9	100	1932	..	450	13	8	44	515
1933	..	85	3	1	11	100	1933	..	561	22	7	73	663
1934	..	86	4	-	10	100	1934	..	666	27	4	75	772
1935	..	86	3	-	11	100	1935	..	808	32	-	100	940
1936	..	86	4	-	10	100	1936	..	875	38	-	109	1,022
1937	..	85	3	-	12	100	1937	..	1,021	41	-	137	1,199
1938	..	83	4	-	13	100	1938	..	815	42	3	130	990

V=Viscose. C=Cuprammonium. N=Nitrocellulose. A=Acetate.

a. Included under Germany.

WORLD PRODUCTION OF COTTON, WOOL, SILK AND RAYON
(Millions of lbs. and per cent.)

		Cotton		Wool		Silk		Rayon		Total	
			%		%		%		%		%
1930	..	12,400	82	2,220	14	104	1	457	3	15,181	100
1931	..	12,900	82	2,230	14	101	1	508	3	15,739	100
1932	..	11,500	81	2,200	15	89	1	535	3	14,324	100
1933	..	12,700	82	2,170	13	82	1	691	4	15,643	100
1934	..	11,400	80	2,120	14	79	1	824	5	14,423	100
1935	..	12,800	79	2,160	13	89	1	1,080	7	16,129	100
1936	..	15,000	80	2,230	12	83	1	1,321	7	18,634	100
1937	..	18,300	82	2,230	10	83	—	1,818	8	22,431	100
1938	..	13,600	76	2,220	12	78	1	1,948	11	17,846	100

U.K. RAYON PRODUCTION

United Kingdom production of rayon yarn, waste and staple fibre in April, totalled 13,200,000 lbs. This compares with 15,500,000 lbs. in the previous month, and 10,600,000 lbs. in April last year. The output of continuous filament rayon yarn during April was 8,400,000 lbs., against 10,400,000 lbs. in the previous month, and 8,600,000 lbs. in April last year.

The output of staple fibre and waste in April was 4,800,000 lbs., comparing with only 2,000,000 lbs. in April, 1938.

The following table shows the output of rayon yarn, waste and staple fibre for the separate months together with previous year's figures for comparison :—

			1939	1938	1937	1936
			lb.	lb.	lb.	lb.
January	..	..	11,816,000	12,500,000	11,740,000	11,940,000
February	..	..	12,500,000	12,200,000	11,720,000	11,700,000
March	..	..	15,500,000	13,300,000	12,520,000	12,400,000
April	..	..	13,200,000	10,600,000	13,670,000	10,870,000
May	..	..	—	13,300,000	12,180,000	12,970,000
June	..	..	—	11,100,000	14,060,000	12,320,000
July	..	..	—	11,700,000	14,600,000	13,810,000
August	..	..	—	9,300,000	10,800,000	9,860,000
September	..	..	—	11,800,000	14,400,000	13,240,000
October	..	..	—	11,700,000	13,570,000	13,490,000
November	..	..	—	12,400,000	13,710,000	11,760,000
December	..	..	—	10,300,000	11,820,000	10,950,000
Total (12 months)			—	140,200,000	154,790,000	145,310,000

WORLD RAYON PRODUCTION

(in Thousands of Lbs.)

				RAYON YARN			RAYON STAPLE FIBRE					
				Percentage of World			Percentage of World					
				1914	1936	1937	1938	Total in 1938	1936	1937	1938	Total in 1938
Argentina	..	..	..	—	450	1,850	2,700	—	—	—	—	—
Belgium	..	..	..	6,000	14,200	16,500	11,250	1	—	660	1,550	—
Brazil	..	..	..	—	4,925	7,250	11,725	1	—	—	100	—
Canada	..	..	..	—	13,625	16,500	13,700	1	—	—	—	—
France	..	..	..	2,000	59,500	66,400	61,750	6	6,600	11,300	10,800	1
Austria	..	..	..	1,540	1,875	2,200	^a	—	^a	^a	^a	—
Germany	..	..	..	3,500	99,050	125,000	141,000	14	94,385	219,200	330,000	34
Czecho-Slovakia	..	..	..	—	7,425	9,350	5,350	—	—	660	660	—
Great Britain	..	..	..	4,000	116,810	119,700	106,450	12	26,160	32,720	31,745	3
Greece	..	..	..	—	275	410	590	—	20	110	130	—
Hungary	..	..	..	—	110	110	110	—	—	—	—	—
Italy	..	..	..	330	86,000	106,550	101,425	10	110,100	156,350	168,885	17
Japan	..	..	..	—	275,000	334,350	209,600	21	48,850	174,250	375,000	39
Netherlands	..	..	..	—	20,950	23,200	19,850	2	1,100	220	100	—
Norway	..	..	..	—	—	170	310	—	—	150	75	—
Poland	..	..	..	—	11,700	14,000	13,700	1	1,200	2,270	8,750	1
Portugal	..	..	..	—	215	240	400	—	—	—	—	—
Roumania	..	..	..	—	650	1,325	1,850	—	—	—	—	—
Spain	..	..	..	—	5,925	2,200	1,100	—	—	—	—	—
Sweden	..	..	..	—	1,625	1,750	1,760	—	485	1,180	2,070	—
Switzerland	..	..	..	600	11,000	12,125	12,000	1	—	—	75	—
U.S.S.R.	..	..	..	—	13,600	15,400	16,000	2	—	—	—	—
United States	..	..	..	2,420	277,640	321,680	257,625	26	12,300	20,345	29,860	3
World Total	..	..	..	19,700	1,022,550	1,198,760	990,245	100	298,200	619,315	957,900	100

^a Add to Germany after 1937.

EXPORTS OF TEXTILE FIBRES AND MANUFACTURES FROM U.S.A.

Exports of cotton and other textile fibres and manufactures thereof from the United States during the first quarter of 1939 were valued at \$71,199,000, against \$103,375,000 in the first three months of 1938. The decline was in exports of unmanufactured cotton, which dropped in value to \$45,665,000 from \$78,909,000. The quantity of raw cotton exported fell to 883,506 bales from 1,472,113, while exports of cotton linters declined to 53,035 bales from 71,208. Shipments of other textile fibres and products increased slightly in value, to \$25,534,000 from \$24,466,000.

Cotton semi-manufactures and manufactures to the value of \$15,097,000 were exported in the March quarter of 1939, against \$15,347,000 in the 1938 period. The largest item in this group is "Cotton cloth, duck and tyre fabrics," which accounted for a value of \$8,223,000 in the 1939 period and for \$8,188,000 in the 1938 quarter, the quantities shipped having totalled respectively, 85,393,000 and 86,692,000 square yards. Other important categories of textiles exported in the March quarter of 1939 were: Wool semi-manufactures and manufactures, \$642,000 (\$568,000 in the 1938 period); silk manufactures, \$1,622,000 (\$1,393,000); rayon and other synthetic textiles, \$4,106,000 (\$2,922,000); and manufactures of vegetable fibres, other than cotton, \$628,000 (\$742,000).

The United States imported (for consumption) textile fibres and manufactures thereof to the value of \$81,322,000 in January-March, 1939, a marked increase over the value of such imports in the corresponding period of 1938—\$69,088,000.

U.S.A.

AMERICAN COTTON CONSUMPTION April 1939, with Comparisons

Month	1913-14	1934-35	1935-36	1936-37	1937-38	1938-39	5-year average 1933-34 to 1937-38	Percent this year is of 5-year average
	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Percent</i>
Aug. . .	432,350	418,941	408,325	575,014	603,617	561,406	518,960	108.1
Sept. . .	442,435	294,696	450,647	629,767	601,305	534,037	495,179	107.8
Oct. . .	511,923	523,082	552,840	651,086	524,188	542,778	561,040	98.6
Nov. . .	456,356	480,081	512,312	625,794	482,976	596,289	515,282	110.6
Dec. . .	456,262	417,344	499,773	694,841	432,328	565,307	478,362	118.2
Jan. . .	517,299	550,553	590,484	678,786	433,258	591,991	552,220	107.2
Feb. . .	455,231	480,339	515,977	665,677	426,806	562,293	513,181	109.6
March . .	493,354	482,373	550,641	776,942	512,626	649,237	573,490	113.2
April . .	499,646	468,402	576,762	718,976	413,169	546,702	537,980	101.6
Total 9 m'th	4,264,856	4,115,761	4,657,761	6,016,882	4,480,333	5,150,040	4,735,694	108.7
May . .	466,744	470,412	530,894	669,065	426,149	—	523,284	—
June . .	446,145	383,982	555,449	680,521	443,043	—	485,251	—
July . .	448,333	390,712	607,056	585,011	448,453	—	477,837	—
Total 12 m'th	5,626,078	5,360,867	6,351,160	7,950,079	5,747,978	—	6,222,066	—

Linters consumed during the month of April 1939, amounted to 69,147 bales, compared with 73,769 bales in March and 57,475 bales in April 1938. Linters consumed during the 9 months ended April 30, amounted to 620,595 bales in 1939 and 536,677 bales in 1938.

COTTON TRADE STATISTICS

IMPORTS OF FOREIGN COTTON
August 1, 1938 to April 30, 1939, with Comparisons
(500-lb. bales)

Country of production	1913-14	1934-35	1935-36	1936-37	1937-38	1938-39	5-year average 1934-38	Percent this year is of 5-year average
Egypt	92,623	58,611	47,535	59,391	35,191	33,787	55,122	61.3
Peru	10,136	1,064	932	1,511	676	340	1,524	22.3
China	13,151	3,059	19,173	30,392	9,270	25,584	15,593	164.1
Mexico	26,630	1,595	2,714	27,391	21,640	18,626	10,953	170.0
India	4,964	18,427	31,003	44,669	30,004	27,965	27,990	99.9
Other countries	670	741	802	3,783	1,965	1,823	1,610	113.8
Total .. .	148,074	83,497	102,159	167,137	98,746	108,125	112,792	95.9

EXPORTS OF AMERICAN COTTON
TO WEEK ENDING FRIDAY, JULY 7, 1939

	Since Aug. 1 This Year	Since Aug. 1 Last Year
Great Britain	480,808	1,602,545
France	395,316	752,433
Germany	487,265	888,548
Holland	74,874	135,249
Belgium	94,994	200,034
Russia	—	—
Denmark	60,106	68,693
Norway	11,954	10,602
Sweden	90,688	83,280
Portugal	3,930	26,960
Spain	14,500	278
Poland	209,082	251,931
Italy	314,551	557,265
Japan	884,356	661,662
China	93,510	47,694
Manchukuo	2,099	37,932
British Columbia	24,415	16,223
Finland	12,542	13,956
India	2,096	143,238
South Africa	977	2,522
South America	13,855	16,500
Cuba	11,569	7,863
Latvia	1,889	797
Philippine Islands	1,030	1,018
Australia	7,312	10,843
Estonia	3,673	3,073
Canada	227,463	249,399
Jugoslavia	—	600
Czechoslovakia	850	260
Bulgaria	—	250
New Zealand	—	7
Total (Including Shipments to Canada) .. .	3,525,704	5,791,660

U.S. COTTON CONSUMPTION AND STOCKS

The monthly report of the U.S. Census Bureau shows that the consumption of lint cotton by domestic mills in June amounted to 578,000 bales, against 605,000 bales in May and 443,000 bales in June last year. This brings the total so far this season to 6,332,000 bales,

against 5,307,000 bales a year ago. Stocks in the hands of manufacturers amount to 1,021,000 bales, against 1,175,000 bales last month and 1,416,000 bales in the corresponding month last year, and in outside warehouses to 11,944,000 bales, against 12,370,000 bales, and 9,697,000 bales.

Spindles active during June totalled 21,788,000 against 21,975,000 in May and 21,144,000 in June last year.

COTTON CONSUMPTION IN UNITED STATES MILLS

(Thousands of Running Bales)

	1939	1938	1937	1936	1935
January	592	435	678	591	551
February	562	428	664	517	480
March	649	511	779	549	482
April	547	414	719	577	468
May	605	426	669	531	470
June	578	443	681	556	386
July	—	450	583	603	391
August	—	561	604	574	408
September	—	435	602	630	449
October	—	543	526	646	552
November	—	596	485	627	508
December	—	565	433	693	498
Total	—	5,906	7,423	7,094	5,643

THE

TEXTILE WEEKLY

(THE BRITISH MANAGERS' OWN OFFICIAL ORGAN)

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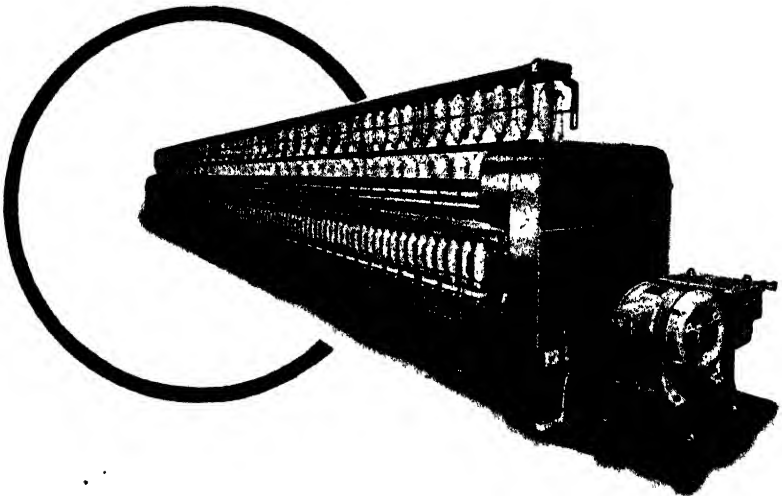
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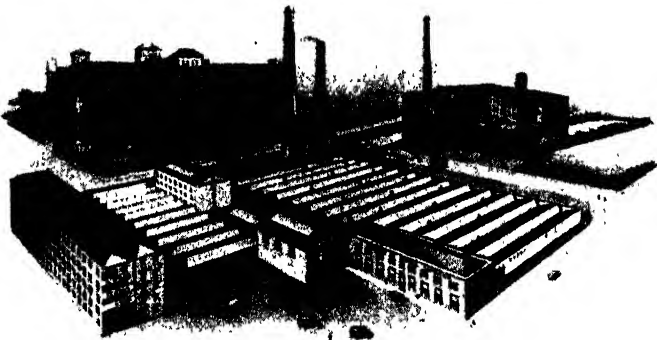
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